

Request for Quotation (RFQ) for Services

RFQ Title:	Video Editor Contract
RFQ Issue Date:	September 1, 2022
Terms of Reference / Specifications:	The services to be delivered are detailed in the attached schedule
Project	Amazon Investor Coalition
The Company	Earth Innovation Institute
Jurisdiction	United States of America
Closing Date and Time	September 15, 6 pm ET
Validity Period	Proposals must be valid for at least 30 days from the date of submission.
Details for Submission	Proposals must be submitted via email to sarah@amazoninvestor.org, with the subject "Proposal for Video Editor"

Thank you for your interest in the above procurement. As the implementer of the Amazon Investor Coalition project, the Earth Innovation Institute invites you to submit a quote for the Services listed below. Your quote will be valid for the Validity Period.

Please forward your quote in accordance with the Details for Submission above by the Closing Date and Time.

If you have any queries, please do not hesitate to contact us by email:

Sarah Ingersoll sarah@amazoninvestor.org

Terms and Conditions

1. Quote Conditions

By submitting a quote, 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. Quote 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 RFQ unless the Company determines to do so otherwise at its sole discretion.

3. Evaluation

The Company may review all quotes to confirm compliance with this RFQ and to determine the best quote in the circumstances.

4. Alterations

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

5. The Company's Rights

The Company may, at its discretion, discontinue the RFQ; decline to accept any quote; 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 Quote; satisfy its requirement separately from the RFQ process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate quotes 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 RFQ prior to the RFQ Closing Time by issuing an amendment to the RFQ in the same manner as the original RFQ was distributed. Such amendments or clarifications will, as far as is practicable, be issued simultaneously to all parties. Any queries regarding this RFQ should be directed to the Contact Person identified on the cover page of this RFQ.

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 quotes. In doing so, the Company will not allow any potential supplier to substantially tailor or amend their quote.

8. Confidentiality

In their quote, potential suppliers must identify any aspects of their quote 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 quote.

The potential supplier acknowledges that in the course of this RFQ, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFQ). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorized 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 RFQ and after the completion of the process.

9. Alternatives

Potential suppliers may submit quotes for alternative methods of addressing the Company's requirement described in the RFQ where the option to do so was stated in the RFQ or agreed in writing with the Company prior to the RFQ 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 RFQ 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 quote. And provide it to the Company upon request.

11. Price Basis

Prices quoted must be provided as a fixed maximum price and 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 judgment 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 RFQ the following order of precedence shall apply: (a) these Terms and Conditions; (b) the first page of this RFQ; 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 quote or the RFQ process. Potential suppliers must disclose where quotes have been compiled with the assistance of current or former 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 quote 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 RFQ) which could give rise to a perception of bribery or corruption in relation to the RFQ or any other dealings between the parties.

17. Jurisdiction

This Agreement shall be subject to the laws of the Jurisdiction. The Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this Agreement 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 Agreement or the breach, termination, or invalidity thereof, shall be settled by arbitration in accordance with the UNCITRAL Arbitration Rules in effect on the date of this Agreement. The appointing authority shall be the Secretary-General of the Permanent Court of Arbitration. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute. The place of arbitration shall be the headquarters location of the Company at the time the claim is filed and the language of the arbitration will be English. The relevant laws shall be the laws of the Jurisdiction.

Terms of Reference

1. Background on Amazon Investor Coalition

The Amazon Investor Coalition (AIC), a collaborative program of the Earth Innovation Institute (EII) and the Giving Back Fund, aims to increase and improve investment in forest-friendly economic development, and the rule of law, across the Amazon region of South America. The AIC is a global learning-and-collaboration platform that unites investors, donors, and corporations, in partnership with governments, civil society, and allies.

Given the critical role of the Amazon ecosystem in mediating the global water and carbon cycles, the Amazon forest and its forest guardians need to be at the heart of the global economic agenda. By helping global markets properly value rainforests, soils, and biodiversity, the AIC aims to make forests worth more alive and standing than cut and burned.

AIC facilitates a virtuous cycle of innovation and investment to scale solutions, and reduce deforestation, through the following five strategic initiatives:

1. Activate Entrepreneurship and an Impact Innovation Ecosystem – by nurturing Amazon startups and fortifying regional incubators and accelerators through technical assistance, ecosystem cross-learning, and access to capital providers.

2. Build Evidence, Increase Awareness, and Integrate Capital – by conducting research, expanding market data about the bioeconomy and integrating capital through industry analysis and investor networking events, including weekly community meetings, impact network roundtables, and an annual Summit on Investing in the Amazon.

3. Mobilize Catalytic Philanthropy – toward a shared Amazon Bioeconomy Catalytic Philanthropy Roadmap and Toolkit that provides patient, risk-tolerant capital and blended finance to unlock markets that enrich soils, improve livelihoods, sustain biodiversity, protect forests, deliver on climate action and ensure the rule of law..

4. Facilitate Deal Flow – through a pan-Amazonian alliance of entrepreneurship incubators and accelerators in order to improve resource efficiencies, increase transparency, and match investor appetites to one-stop, fit-for-purpose portfolios and startup pitch sessions.

5. Scale Corporate Demand – for regeneratively sourced Amazon products by forging connections, developing long-term purchase contracts and promoting public commitments between buyers, sellers, and aggregators in forest friendly value chains.

In 2022, the AIC and EII joined with CERTI Foundation (CERTI, Brazil) in a multilateral strategic Partnership, with support from the British government's Partnerships for Forests (P4F). The Partnership aims to protect Amazon ecosystems, restore food systems, drawdown carbon, and create regional wealth by mobilizing the global finance community (AIC) and the Amazon entrepreneurship community (CERT), and subnational Amazon governments and farm sectors (EII) to help the Amazon rainforest reach its full economic potential.

We seek to advance a robust forest-positive, social inclusive Amazon **bioeconomy**, which means: Large-scale economic and land-use transition away from industrial-scale monoculture and pasture, towards a rights-based approach to sustainable development, that increases the competitiveness of forests, restores value to degraded soils, and recognizes biological diversity, community rights, and carbon richness as a renewable engine of growth.

In its first year, the Amazon Investor Coalition aims to increase and improve the allocation of blended capital in the region by mobilizing and uniting \$10m in philanthropy, \$30m in private investment, and \$5m in corporate purchasing agreements for sustainably sourced rainforest goods. No funds for these investments go through the AIC, we are a nonprofit that makes information about opportunities transparent, facilitates connections, and provides support.

2. Objectives of the Assignment

The AIC seeks a video editor (“consultant”) to produce 4 brief videos and 10 social media video clips to support a bioeconomy marketing campaign aimed at increasing: 1) philanthropic grantmaking, 2) private investment, and 3) corporate procurement that facilitates forest-friendly economic development in the Amazon region of South America.

Key Audience – The primary target audiences for the videos are what we are calling “investors” in the general sense, across a range of capital asset classes (investors, philanthropists, companies). The location of the target investors is the United States, European Union, Brazil, Ecuador, Columbia and Peru. They include:

1. *Philanthropists & Foundations who are funding or might consider funding programs that build the bioeconomy and leverage private and corporate investment*
 - a. Foundation executives
 - b. High Net Worth donors
 - c. Philanthropy impact networks
2. *Private Investors in Startups, Businesses, and Funds*
 - a. Return-driven impact investors with an interest in climate, nature, & emerging markets (fund managers and family offices especially; angel, private venture, venture capital, and real asset investors; and financial advisors)
 - b. Impact-first investors/donors (high-net-worth and ultra-high-net-worth individuals) with an interest in reversing climate change and deforestation (green funds, impact investing networks)
3. *Corporate buyers of products and corporate investors in product development and social responsibility with sustainability business objectives*
 - a. Chief Executive Officers
 - b. Corporate procurement Vice Presidents
 - c. Heads of Corporate Foundations, Community Social Responsibility (CSR), or relevant research & development
 - d. Corporate sustainability networks

The Content & Strategic Objectives – AIC with its partners has conducted an extensive assessment of bioeconomy investment needs and opportunities in the Amazon (including mapping bioeconomy Amazon start-ups, products, and philanthropic opportunities; and accelerators, incubators, entrepreneurship ecosystem strengthening organizations). We have also conducted an assessment of

the philanthropists, investors and corporations whose needs we want to meet to support their interest in investing in these opportunities.

AIC's market research and data are informing the development of key content that will be shared with the target audiences in various formats from social media posts, one-page snapshots, briefs, articles, slide deck presentations, and videos. The purpose is to move people along a journey from 1) inspiration and a call to action; to 2) education about the opportunity in general; to 3) specific investment opportunities; and to 4) investing with the support of peers, strategic consulting, mentorship, and connections.

The four videos and social media short form videos will accomplish these objectives by adapting AIC content into production-quality compelling video:

- Making the investment case by presenting evidence of the financial and social/environmental value of biodiversity-positive enterprises, and bioeconomy market projections.
- Showcasing examples of innovative business models and mature business success.
- Highlighting philanthropists, investors, and companies already doing the investing.
- Emphasizing the importance of AIC's multi-capital approach; i.e. how procurement, philanthropic, and investment capital de-risk, leverage and reinforce each other; and the evolving sophistication of blended finance vehicles for making it less risky to invest.
- Demonstrating the maturity of the Amazon's entrepreneurship ecosystem and regional impact business innovation.
- Promoting to philanthropists the Roadmap for catalytic grant-making, to investors the startups, and for Corporations the procurement opportunities that AIC has identified.
- Making Amazon bioeconomy philanthropy, investment, and purchasing seem easy by providing a clear point of entry to AIC's programs and resources (i.e., data, media, podcasts, events, mentors, pitch sessions, Amazon study trips, strategic consulting, etc.).
- Establish credentials for AIC as an evidence-based, action-oriented, financially savvy, added value resource for moving capital to protect the Amazon and address the climate crisis.

3. Scope of the Assignment

Four production-quality videos are required along with 10 short form video clips for social media (10-60 seconds in length):

- The first is a "sizzler" promotional video aimed at all key investor audiences. This is essentially a recruitment video. (Approximately 3 minutes in length)
- The second, third, and fourth are aimed at each of the three key audiences: 1) philanthropists, 2) Investors, and 3) Corporate executives. (Approximately 5 minutes each).

The activities of the consultant include the following:

- A. Script - Adapt AIC's draft scripts into a powerful video narrative script.
- B. Shoots - Coordinate shoots (mostly interviews) in Europe, US, and Brazil conducted by regional AIC volunteers (or by the editor's partners). This will be supported by AIC staff who will make introductions.
- C. B-roll - Identify and procure stock b-roll footage of investable projects and related inspiring impact opportunities in the Amazon.

- D. Graphics – Obtain AIC–designed graphics and transform them into animations; and produce other titles and graphics as needed.
- E. Translation – Produce Portuguese and Spanish language translations of each of the four main videos.

Each of the four videos will likely include:

- 3-4 interviews per video of philanthropist, investor, corporate leader, and/or entrepreneur.
- B-roll of amazon investment success stories and new investment opportunities.
- 3-4 Graphics on finances/opportunities, designed by AIC graphic designer

4. Deliverables & Approximate Timeline

Three key dates for deliverables are non negotiable:

- 1) The English–version of the sizzler video is to be completed by November 24. It will be shown on the first day of the AIC’s virtual Annual Global Summit on Investing in the Amazon which takes place November 29–December 9.
- 2) All English–version products must be complete by February 15, 2023
- 3) All products must be complete by February 29, 2023.

Below is an approximate timeline. The potential consultant should provide their version of a timeline that will deliver the videos on or before their due dates. We welcome an expedited timeline, contingent on AIC’s staff available time for review.

Dates	Deliverables	Payment
September 19-30	Orient to AIC and Outline Script – Review AIC overview deck, talking points, preliminary results from Bioeconomy research, and philanthropy roadmap, investor brief, and corporate brief.	
October 1-15	Sizzler Script finalized. Initial 3-4 sizzler interviews scheduled.	20%
October 16-31	All sizzler interviews completed.	
November 1-15	Sizzler roughcut.	20%
November 16-24	*Final version of English sizzler video is due on November 28, ro be shown at AIC Summit.	
December 1-15	Sizzler video translated to Spanish and Portuguese. Draft scripts of 3 key investor videos ready for review.	20%
December 16-31	Final scripts of 3 key investor videos.	
January 1-15	Interviews scheduled for 3 videos. 5 out of 10 short form video clips.	

January 16-30	Interviews conducted. B-roll obtained. Rough cut of 3 videos.	20%
February 1-15	Total 10 Short form video clips delivered. *Final cut of 3 English version videos.	
February 16-29	Translation of 3 videos into Spanish and Portuguese. *All deliverables complete.	20%

5. Requirements for Submission of Proposals

In response to this RFQ, bidders must submit a technical-financial proposal on how they will meet the requirements, preferably typed on company letterhead, in a single column format, using a font lower than 12 points.

Technical-financial proposals must present at least the following items:

1. Characterization of the proposing organization with information that proves qualifications to develop the work;
2. Description of the proposed activities including:
 - a. Understanding of the project context and challenge;
 - b. The work methodology that will be used to develop the specified products.
3. Budget proposal, with a breakdown of the main expenditure lines.
4. Examples, references, appendices that demonstrate the technical qualification of the company.

6. Evaluation Process

The company will evaluate potential consultants on the basis of a technical and financial assessment. These assessments will be undertaken by an internal Procurement Committee.

The Technical Assessment will account for 80% of the overall score. Following consideration of the technical merit of the potential consultant, a like-for-like price assessment will be undertaken by the Company of only the potential suppliers assessed as technically suitable (those meeting the Minimum Score Requirement).

7. Technical Assessment

The Technical Assessment places emphasis on the degree of confidence the Company has in a potential supplier's ability to deliver the services effectively.

The following selection criteria and weighting will be used in the assessment of the technical capacity of a potential supplier.

Scoring Methodology for the Technical Submission	
5	Excellent, addresses the requirements of the RFQ, and where relevant demonstrates fine tuning, to make a match with Client expectations, and is of a quality and level of detail and understanding that provides confidence in certainty of delivery and permits full contractual reliance (where applicable).
4	High degree of confidence that they can meet the requirements of the RFQ (and where relevant strong evidence they have tailored their response to meet these). Demonstrates they have a thorough understanding of what is being asked for and that they can do what they say they will; translates well into contractual terms (where applicable).
3	An understanding of all issues relating to delivery of the RFQ and tailoring the response to demonstrate that proposals are feasible so that there is a good level of confidence that they will deliver; can be transposed into contractual terms (where applicable).
2	Understands most of the issues relating to delivery of the RFQ and addresses them appropriately with sufficient information, but only some relevant tailoring and so only some confidence that they will be able deliver in line with expectations.
1	Some misunderstandings of the issues relating to delivery of the RFQ and a generally low level of quality information and detail. Poor appetite to tailor when asked and so fails to meet expectations in many ways and provides insufficient confidence.
0	RFQ issues are scantily understood and flimsy on quality information, with minimal tailoring if anywhere relevant. Provides no confidence that the issues will be addressed and managed at all in line with expectations.

Technical Submissions must be in the following format and must follow the structure below:

Form of Technical Submission		Page Limit	Weight X Score		Max Weighted Score	Minimum Score Requirement
1	<u>Quality of Personnel and/or Partners</u> Potential Suppliers should describe, referring to the CVs submitted to evidence any statements, how the Nominated Personnel fulfill each of the criteria set out in the Specification of the Advisory Support section and are sufficiently skilled staff to undertake all aspects of the Objectives and Scope of the Assignment.	2	6	0 to 5	30	2 out of 5
Response:						

2	<p><u>Methodology and Approach to Delivery of the Services</u></p> <p>2.1 Potential Suppliers should describe from their own understanding of the Objectives and Scope of the Assignment, as well as the context of the project, how their Nominated Personnel will facilitate delivery of the tasks set out. (Weighted 7/10).</p> <p>2.2 Potential Suppliers are also expected to describe their approach to ensuring optimal value for money. (Weighted 2/10)</p> <p>2.3 A half page anticipated work plan, plotting the delivery of the tasks mentioned above linked to the level of effort of each of the Nominated Personnel, should also be provided. This Work plan must identify proposed output based payment deliverables, dates and amounts. (Weighted 1/10)</p>	3	10	0 to 5	50	2 out of 5
Response:						
3	<p><u>Relevant Experience</u></p> <p>Potential Suppliers should identify 2 assignments undertaken within the last 2 years relevant to this RFQ and the project context. A brief summary of each of the assignments should be provided, as should the name and contact details for referees who can verify performance.</p>	2	4	0 to 5	20	2 out of 5
Response:						

1. **CVs must be provided** for all Nominated Personnel expected to contribute to the performance of this RFQ (no longer than five pages in length each).
2. The technical submission format **must** clearly address the criteria above as this will impact on the assessment process.
3. The technical submission should **not exceed seven pages** (excluding CVs), must be in single column format and not be in a type font of less than 12 points.

8. Financial Assessment

The financial Limit of this RFQ is **\$18,600** and the Quotation Price plus (+) the Total Reimbursable Expenses cannot exceed the Financial Limit. Where the Financial Limit is exceeded, the Company reserves the right not to accept the RFQ.

Using the below format (or other comprehensive and clear financial assessment model) potential suppliers must state the daily fee rates (based on an 8 hour working day for one person) for all the Nominated Personnel. Fee rates should include all costs that are not reimbursable, and must be in Pound Sterling (GBP).

For those consultant organizations that are well-established, the AIC welcomes the donation of pro bono services to further scale this initiative.

The Quotation Price (which should be inclusive of any relevant taxes) will form the basis of the comparative price assessment. The Quotation Price (in addition to any Reimbursable Expenses) shall be the amount that is used for contracting.

Consultant	Daily Fee Rate	Number of Days	Cost
E.g. Consultant A	e.g. \$150	e.g. 2	e.g. \$200 (2x\$100)
E.g. Consultant B	e.g. \$50	e.g. 3	e.g. \$150 (3x\$50)
Total Cost excluding Taxes			e.g. \$350
Any Relevant Taxes (e.g. VAT)			e.g. \$70
Quotation Price			e.g. \$420

Using the below format potential suppliers must provide a budget and total value of all expected Reimbursable Expenses. These will not form part of the Quotation Price and will not be considered in the comparative price assessment, but (in addition to the Quotation Price) shall be used for contracting.

Reimbursable Expenses	Units	Price	Cost
E.g. International Flight to [X] from [X]	E.g. 2 (if 2 consultants)	e.g. \$100	e.g. \$200 (2 x \$100)
Total Reimbursable Expenses			e.g. \$200

The following financial aspects need to be taken into consideration:

- a. The rates should be based only on the number of days specified the Terms of Reference;
- b. All activity preparation costs are the responsibility of the potential supplier;
- c. A requirement is for the preferred potential supplier to submit a quarterly Progress and Financial Report and an Activity Completion Report at the end of the activity. All costs associated with the preparation and submission of these reports are the responsibility of the preferred potential supplier.
- d. Payment of fees and reimbursable costs may be withheld due to non-approval by the Regional Programme Manager of the Progress / Financial / Activity Completion Report.
- e. To be eligible for reimbursement all Reimbursable Expenses must be incurred in accordance with the P4F Guidelines for Using Grant Funds. Inclusion in a successful quotation will not mean Reimbursable Expenses are eligible for reimbursement if they are contrary to the P4F Guidelines for Using Grant Funds.

9. Responsibilities of the Company

Confirm that the selected Consultant is aware and compliant with all terms and conditions of the contract and briefing documents.

10. Contractor Responsibilities

To be prepared to sign the Standard Contract Terms

To have in place insurance policies covering Professional Indemnity and Public Liability (if contracting as an appropriately registered entity rather than in an individual capacity).

To be registered in a Jurisdiction that is acceptable to the Company.

Organize appropriate travel, accommodation and travel insurance arrangements using the Company's systems (if applicable).

To hold any regulatory permits or approvals required to provide the services, either as an individual or through a registered entity

To complete the quarterly progress and financial reports and activity completion report in the prescribed format and on the required dates.

If your quote is successful, you will be required to enter into the Company's standard contract for the types of Services being provided. In the provision of the Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant Project Manual. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any quotes pursuant to this RFQ.

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 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.