

*September 8 Reposting Update: Minimum Requirements and Evaluation Criteria sections have been revised.*

*August 14 update: Clarifications to bidders*

- 1) Question: I am writing to you with the purpose to seek clarification regarding eligibility of the bidders. More specifically, I understand from the text that the consultant might be either company or individual consultant. Is that correct, and if yes, is there any preference for CI?

Response: The CI GEF/GCF Agencies do not have a preference between a company or individual. All bidders will be assessed and scored according the Evaluation Criteria in Section 7 of this RFP.

## **Request for Proposals**

**Title: GEF-GCF Proposal, Accreditation/Re-accreditation and Compliance Maintenance Support**

**RFP No: 2023-05**

**Date of Issuance:** August 1, 2023, Re-issued September 8, 2023

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### **1. Background**

In November 2013, CI was accredited as one of the first non-governmental organizations to become a Global Environmental Fund (GEF) Project Agency and joined the ranks of the World Bank, UN Agencies, and others as a GEF Agency. The CI-GEF Agency is responsible for granting funds on behalf of the GEF. This team oversees project implementation and oversight of project execution to ensure that the project is being carried out in accordance with all CI-GEF policies and procedures.

In July 2015, Conservation International (CI) became the first international NGO to be approved as a Green Climate Fund (GCF) Accredited Entity (AE), allowing CI to implement GCF projects globally. As an AE, CI, through its CI-GCF Agency, works directly with national governments around the world to identify and design effective climate change projects. The CI-GCF Agency also oversees project management and implementation, ensuring that projects meet high technical and financial standards of all GCF policies and procedures.

The CI-GEF/GCF Agencies currently have a combined portfolio of more than 40 conservation and climate-change projects under implementation around the world totaling more than \$200 million in project value with a large pipeline of projects under development.

CI is issuing a Request for Proposal to hire a consultant (Bidder) for support in developing CI's GEF/GCF reaccreditation applications and assessments, maintaining CI's accreditation to the GEF and GCF, and

meeting compliance requirements, and for ad-hoc support to CI-GEF/GCF proposal development and implementation. CI is seeking a bidder that has successfully led and/or supported organizations to meet the accreditation requirements and other institutional policies of both the GEF and GCF. The consultant will be responsible for various ad hoc tasks, including drafting reaccreditation applications and AE Self-assessment Reports, coordinating with CI divisions for inputs, drafting accreditation maintenance activities such as GCF's annual self-assessment, providing support to due diligence of awardees and sub-awardees, conducting a financial review of reports, reviewing and analyzing policies, assisting with proposal development, and supporting accreditation upgrade, as needed. Additionally, the consultant may be tasked with reviewing of project site visit reports, M&E, developing action plans, and providing expertise for and/or creating or updating policies, procedures, and templates. The attached RFP contains all the necessary information for interested Bidders.

## **2. Project Overview**

The main objectives of the consultancy are as follows:

- a) Support CI in maintaining accreditation for the GEF and GCF by drafting annual self-assessment reports and/or reaccreditation application and compiling supporting documents, in coordination with the CI-GEF/GCF Agencies and other CI divisions.
- b) Draft, review, and/or update templates, policies, and procedures for the CI-GEF/GCF Agencies for project development and implementation, in alignment with donor and CI requirements
- c) Provide surge support to ensure project oversight maintenance, including review of financial reporting, site visit report, project action plans, or related project-related monitoring and evaluation reports and tools or training materials.
- d) Provide surge support for proposal development, including review of proposal budgets, executing arrangements, procurement plans, as well as support for awardee and sub-awardee or partner due diligence assessment.
- e) Support CI in researching and preparing accreditation upgrades, as applicable.
- f) Review donor policies and provide synthesis or recommendations for their application to CI-GEF/GCF projects, as applicable.

## **3. Terms of Reference, Deliverables and Deliverables Schedule**

- a. Proposals must include a description of the approach and qualifications that consultants have used to successfully perform the activities described under section 2 including, if applicable, your team's composition for similar assignments.
- b. Deliverables: The consultant will be expected to deliver the following outputs:
  - i. Drafted assessments and reports on accreditation maintenance for GEF and GCF (Approximately 7 days per year)
  - ii. Coordinated inputs from relevant CI divisions for comprehensive documentation.
  - iii. Completed due diligence activities for awardees and sub-awardees (as applicable) using CI-GEF/GCF templates, including financial reviews and compliance checks (Approximately 10 days per year)
  - iv. Updated and refined policies, procedures, and templates as per accreditation, donor, or CI requirements. Approximately 5 days per year)
  - v. Reviewed, edited, and created proposal development documents such as executing arrangements, procurement plans, and budgets. (Approximately 5 days per year)
  - vi. Recommendations and support in drafting the documents required for accreditation, re-accreditation and upgrades as needed. (Approximately 15 days)

- vii. Reviewed project site visit reports, action plans, monitoring and evaluation-related reports and recommendations. (Approximately 8 days per year)
- viii. Reviewed donor policies with synthesis and recommendations as needed. (Approximately 10 days per year)
- c. Deliverable Schedule and Conditions:
  - i. This will be a two-year contract with the possibility of renewal based on performance and cost-effectiveness.
    - 1. Deliverables are requested on a rolling basis throughout the period of performance, and the consultant will be paid based on the actual work and deliverables. Example: If a consultant worked .5 hours to review and provide a written summary for a policy on day 2 of Month x, and that is the deliverable, we would expect to see the daily rate divided 8 and multiplied by 0.5 for the cost of that deliverable.
    - 2. There may be months that the consultant is not tasked with any assignments, while other months there might be a surge in work.
    - 3. The estimated number of days is not guaranteed. The actual level of effort could be much less per year or more, and CI will not be obligated to pay costs beyond the actual level of effort per deliverable.
    - 4. The consultant shall provide a breakdown of deliverables, segregating the costs of the deliverables by donor source GEF or GCF monthly via an invoice. For GCF tasks, the consultant will further break down costs based on CI's guidance.

#### 4. Submission Details

- a. Deadline. Proposals must be received no later than **September 30, 2023, 12am** (EST)/ UTC-05:00). Late submissions will not be accepted. Proposals must be submitted via email to [cigef@conservation.org](mailto:cigef@conservation.org). All proposals are to be submitted following the guidelines listed in this RFP.
- b. Validity of bid. 120 days from the submission deadline
- c. Clarifications. Questions may be submitted to [cigef@conservation.org](mailto:cigef@conservation.org) by the specified date and time in the timeline below. The subject of the email must contain the RFP number and title of the RFP. CI will respond in writing to submitted clarifications by the date specified in the timeline below. Responses to questions that may be of common interest to all bidders will be posted to the CI website and/or communicated via email.
- d. Amendments. At any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.

#### 5. Minimum Requirements

- a. Interested Bidders must have:

- At least 3 years of experience in conducting similar assignments and extensive professional experience. Bidders with less than 3 years of experience in conducting similar assignments will not be considered.
- Familiarity with GEF/GCF proposal development processes and accreditation requirements.
- Strong knowledge of financial reviews of projects, sub-awardee due diligence, and project compliance requirements and measures.
- Excellent communication, drafting and report-writing skills.
- Proven ability to work independently and coordinate inputs from multiple stakeholders.
- Strong analytical and problem-solving capabilities.

**6. Proposal Documents to Include**

- a. Signed cover page on the bidder’s letterhead with the bidder’s contact information.
- b. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)
- c. Technical Proposal (3 pages maximum, excluding CV[s])
  - i. Corporate Capabilities, Experience, Past Performance: Please include descriptions of similar projects or assignments and at least two client references<sup>1</sup>.
  - ii. Qualifications of Key Personnel. Please attach CVs that demonstrate how the consultant or team, if applicable, proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
  - iii. Technical Approach and Methodology. Respond to the requirements found in section 3 of this RFP and provide any additional detail on the bidder's technical approach and how they intend to carry out the requirements found in the Project Overview (Section 2).
- d. Financial Proposal. Offerors shall use the cost proposal template ([Attachment 3](#)).

**7. Evaluation Criteria** In evaluating proposals, CI will seek the best value for money considering the merits of the technical and cost proposals. Proposals will be evaluated using the following criteria.

<b>Evaluation Criteria</b>	<b>Score (out of 100)</b>
Demonstrated track record of completing assignments relevant to supporting/leading GEF Accreditation or Fiduciary Assessment conducted by third parties	20
Demonstrated track record of completing assignments relevant to GCF Accreditation, re-accreditation, or annual AE Self-assessment Reports	20

<sup>1</sup> Note that while client references are not included in the evaluation criteria, CI may reach out to them at any point should CI seek additional information on the experience of a consultancy.

Demonstrated track record in at least three activities related to project development and/or implementation: project budget and financial report review; due diligence of grantees; or creation or updates of templates, policies and procedures  1 Activity= 5  2 Activities = 10  3 Areas or more =15	15
Consultant CV(s) demonstrating at least 3 years' experience in conducting successfully similar assignments	15
Reasonable description of technical approach to undertake assignments	10
Cost: Reasonable and Cost-effective Daily Rate	20
Total	100

## 8. Proposal Timeline

RFP Issued	1 August, 2023
Clarifications submitted to CI	11 August, 2023
Clarifications provided to known bidders	16 August, 2023
Complete proposals due to CI	1 September, 2023
RFP Re-Issued	8 September, 2023
Revised RFP Deadline	30 September, 2023
Final selection	15 October 2023

- 9. Resulting Award.** CI anticipates entering into a fee-for-services agreement with the selected bidder by November 2023 to January 2024. CI shall pay Service Provider an amount based on a mutually agreed-upon daily rate for such times as the Service Provider actually performs Services under the agreement in performing requested activities via ad-hoc task orders. Any resulting agreement will be subject to the terms and conditions of CI's Services Agreement. A model form of agreement can be provided upon request.
- 10.** This RFP does not obligate CI to execute a contract, nor does it commit CI to pay any costs incurred in the preparation or submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI. CI will, in its sole discretion, select the winning proposal and is not obligated to share individual evaluation results.
- 11. Confidentiality** All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. CI may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. CI's evaluation results are confidential and applicant scoring will not be shared among bidders.

**12. Code of Ethics** All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics and the Green Climate Fund's [Policy on Prohibited Practices](#). Conservation International's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CI's Code of Ethics (the "Code") provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violation of the Code of Ethics, as well as concerns regarding the integrity of the procurement process and documents should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

**2. Attachments:**

Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility

**Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility**

RFP No. XXXXXXXX

UEI Number (if applicable): XXX-XXX-XXX

All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics. CI's Code of Ethics provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violations of the Code of Ethics should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

CI relies on the personal integrity, good judgment and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

**I. With respect to CI's Code of Ethics, we certify:**

- a. We understand and accept that CI, its contractual partners, grantees and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

**II. With respect to social and environmental standards, we certify:**

- a. We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.
- b. We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in



line with the laws and regulations applicable to the country where the contract is to be performed.

**III. With respect to our eligibility and professional conduct, we certify:**

- a. We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror’s business
- b. We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.
- c. We are/were not involved in writing or recommending the terms of reference for this solicitation document.
- d. We have not engaged in any collusion or price fixing with other offerors.
- e. We have not made promises, offers, or grants, directly or indirectly to any CI employees involved in this procurement, or to any government official in relation to the contract to be performed, with the intention of unduly influencing a decision or receiving an improper advantage.
- f. We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.
- g. We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.
- h. We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).
- i. We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration’s List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, “Debarment and Suspension”. [Include additional sanctions lists of the country of a public donor, if required by the donor.]

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_





**Attachment 3: Cost Proposal Template**

The cost proposal must be all-inclusive of profit, fees or taxes. Additional costs cannot be included after award, and revisions to proposed costs may not be made after submission unless expressly requested by CI should the offerors proposal be accepted. Nevertheless, for the purpose of the proposal, Offerors must provide a budget showing expected costs for activities under section 2 (which CI provided number of days as the initial estimated LoE). Offers must show daily rates and estimated LoE for activities described in section 2. All items, services, etc. must be clearly labeled and included in the total offered price. All cost information must be expressed in USD.

If selected, Offeror shall use its best efforts to minimize the financing of any taxes on goods and services, or the importation, manufacture, procurement or supply thereof. If Offeror is eligible to apply for refunds on taxes paid, Offeror shall do so. Any tax savings should be reflected in the total cost.

Cost Breakdown

<b>Description</b>	<b>Number of Days</b>	<b>Daily Rate</b>	<b>Year 1 Amount</b>	<b>Year 2 Amount</b>	<b>Date (Lump Sum, All Inclusive)</b>
Activity 1: Daily rate for activities described under Section 2					
Activity 2:					

