

CI Procurement Procedures & Guidelines

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Introduction

This Procurement Procedures Manual is the set of practices and guidebook for complying with Conservation International (CI's) [Procurement Policy](#). It is a job aid that describes how the procurement of goods and services may be conducted generally at CI.

After an introduction of competitive and non-competitive procurement, the sections of this manual will follow the procurement process (see Diagram 1) to explain the required procedures, provide contextual information, and any additional guidance or tips that might support subaward management. Appendix 1 summarizes the procurement process and required documentation by Tier.

Some programs, field offices or divisions (e.g., Global Environmental Facility (GEF), Green Climate Fund (GCF) and other grant-making programs) may have program-specific procedures that they apply. In addition, donor-specific procurement requirements should always be considered. Furthermore, CI policy is reviewed on a regular basis and procedural changes may occur; it is reasonable to expect that sections of this manual will be under revision from time to time.

Diagram 1.



Competitive versus Non-competitive

Competitive procurement involves inviting multiple suppliers or providers to submit bids, fostering competition and ideally verifying costs and ensuring that CI gets best value for money. This strategy is suited to situations where the market offers a range of qualified suppliers and where the process can unfold without particular urgency.

Non-competitive procurement, also known as **sole source procurement**, bypasses the bidding process entirely to select a single supplier or provider.

Effective procurement ensures cost efficiency, quality assurance, and timely delivery of goods and services. By selecting the right procurement method, we can optimize resources and aim to diversify our

suppliers and relationships.

Procurement Tiers

The following table (Table 1) defines the competitive procurement thresholds for Conservation International. Field offices should align their country-level purchase thresholds to the three Tiers. The regional Senior Director of Operations approves country-level thresholds.

Table 1.

CI Global Procurement Thresholds*		
Tier	Threshold	Procurement Method
Tier 1 Micro-purchase	US: Less than or equal to \$10,000 Field: Determined Locally	Tier 1 purchases may be made without obtaining competitive proposals or quotations provided the price is fair and reasonable. To the extent practical, these purchases should be distributed equitably among qualified suppliers in the local area and should not be split to avoid the requirements for competition above the Tier 1 threshold.
Tier 2 Simplified procedure	US: \$10,001 – \$50,000 Field: Determined Locally	Consulting Services: Obtain a minimum of three proposals or three quotations solicited from qualified suppliers or service providers. Proposals for consulting services are scored using the Bid Comparison Matrix by a minimum of two people.
		Goods, Works & Non-consulting services: Minimum three proposals or three quotations solicited from qualified suppliers or service providers. Quotations for supplies and equipment may be evaluated by the Procurement Lead using the Bid Comparison Matrix.
Tier 3 Formal procedure	US: \$50,001 and up Field: Determined Locally	Free and open competitive procurement that publishes a formal Request for Proposal (RFP). RFPs are widely disseminated and publicly advertised for a minimum of three weeks. A selection panel with a minimum of three people is convened to score and evaluate proposals. Selection is memorialized in a Selection Memo.
*Specific donors may have procurement policies and thresholds that differ from CI's. In those instances, the more restrictive policy should be followed.		

Non-competitive (“Sole Source”) Procurement

Resources:

Sole Source Justification

CI discourages procurement of goods and services on the basis of sole source. Before engaging in sole source procurement, the Project Lead/Buyer is encouraged to expand the RFP/RFQ beyond the local market and to advertise the procurement opportunity in a wide and diverse set of publications online, in print, social media and trade or industry specific platforms for communications. Sole source procurement is allowable only under the five circumstances outlined below.

The sole source justification form should be prepared by the Project Lead/Buyer and approved by the Operations Director. Justification memos must be sufficiently detailed to substantiate the reasons for sole sourcing. The price for the goods or service must be reasonable as demonstrated through research, experience, purchase history or other information.

The circumstances under which a sole source procurement may be used are as follows:

1. Uniqueness

CI may consider sole source awards when there is only one supplier or vendor that can provide the goods or services to meet the organization’s needs. This may be, for example, because the goods or services are not otherwise available in the accessible marketplace or the goods or services may come from a highly technical or knowledgeable individual or company that specializes in the specific area of expertise, and no other individual or company specializes in the same area. In another example, CI may need goods or services that are controlled by or subject to limited rights to data, patents, copyrights, etc. In the examples, the supplier has a unique capacity to provide the goods or services.

When completing the sole source justification, the Project Lead/Buyer must identify the criteria used to establish that only one supplier can perform the work as follows:

- Adequate research to establish the existence of only one qualified supplier. In the absence of such research the CI office/program shall collect at least two professional referrals from previous customers/clients to verify the quality and value of the consultant’s work;
- Only one Service provider meets CI’s requirements, for example, the service provider needs to be in the same city as CI for service reasons or fragility of the product;
- Product is compatible in all ways with existing system presently installed;
- Highly technical or knowledgeable individuals; and/or
- Proprietary data.

2. Competition Results Are Inadequate

CI may sole source awards when only one qualified supplier responded to CI's solicitation. Staff must demonstrate that a solicitation for bid was widely publicized for an adequate amount of time and that extension of time for solicitation was not possible.

3. Continuation of the Work

CI may sole source awards for tasks that represent a natural continuation of previous work carried out by suppliers where lack of continuity of the work by the same supplier poses a risk to the product or project and there is no reasonable expectation that a subsequent vendor could do better than the incumbent.

4. Collaborative Project

Supplier is named in a proposal to a CI donor who has expressly approved the provider in their award to CI and the donor has not subjected the award to additional review or approval.

5. Unusual or Compelling Urgency

While expected to be rare and infrequent, there may be occasions when CI will need goods or services during a time of unusual or compelling urgency. In this case, an emergency or urgent demand may exist, and competitive procurement would take too long. CI may not use this option for the purpose of exhausting unobligated funds. Lack of planning does not constitute an urgent situation.

Procurement Procedures

Procurement Planning

Resources:

[Procurement Plan Template](#)

[Purchase Order Form](#)

[Terms of Reference](#)

Procurement planning is the process of fully identifying and assessing purchasing needs. During the procurement planning process, the procurement method, timeline for purchasing and budget are determined. Procurement planning includes defining the process for managing individual procurements, assessing and mitigating risks and identifying specific donor prior approvals required throughout the procurement process.

Many donors, including the CI GEF Agency and the CI GCF Agency, require submission of a procurement plan as part of CI's proposal submission package. Revisions to approved procurement plans are subject to the prime donor's prior review and approval. It is also best practice to require sub-recipients of CI funded projects by these donors to prepare a procurement plan for their CI grant as well.

Requirements Definition

Detailed specifications and requirements for the purchase are defined during the planning process. Technical specifications for goods and equipment or a detailed Terms of Reference for consulting services should clearly identify the goods, equipment or services being procured and provide suppliers a clear, accurate and full description of CI's needs. See the below purchase category descriptions.

Goods: For the procurement of goods, specifications must list performance requirements or salient characteristics as well as appropriate nomenclature, typically through a Request for Quotes (RFQ). Specifications should not include make, model, or brand where it limits the availability of goods. When procuring goods, staff should select established providers that provide pre-printed, numbered invoices that include the business name, business address, business phone, fax, website and e-mail contact information. These businesses will have bank accounts in the name of the business to which payments should be made by check or wire transfer. Regular suppliers or vendors should not be paid in cash.

Works/Construction Services: For the procurement of works/construction services, Programs must follow CI's Construction Policy.

Non-consulting Services: For non-consulting services (e.g., printing, catering, transportation) the process and documentation for obtaining non-consulting services follow those for the purchase of goods, typically through a Request for Quotes (RFQ).

Consulting Services: Consulting services are intellectual and advisory in nature and based on a Terms of Reference that includes the project background, purpose, objectives, methodology and reporting requirements for the service provider/supplier. Consulting Services are typically procured through a Request for Proposals (RFP).

For more information on Consulting Services Agreements, please consult the [Grants & Contracts Procedures Manual](#), specifically sections on Contract Terms of Reference and Proposal as well as the Key Components of an Agreement.

Solicitation

Resources

[Request for Quotations Template - English](#)

[Request for Quotations Template - Spanish](#)

[Request for Proposals Template - English](#)

[Request for Proposals Template - Spanish](#)

Solicitation Documents. The solicitation process communicates the procurement requirements and requests quotations or proposals from potential suppliers. Solicitation documents include the defined requirements (detailed specifications or Terms of Reference) and provide specific instructions to guide suppliers on how to prepare quotations or proposals for the goods or services being procured. Once the solicitation documents have been released, the requirements may not change without formal amendment. Solicitation documents should include:

- Background information on the Program funding the services;
- Objective of the services;
- Clear description of the goods in technical specifications or services in a Terms of Reference; such descriptions should not contain elements that may unduly restrict competition;
- The due date for request for clarifications on the solicitation documents;
- The deadline for submission of quotations or proposals;
- Information and documents to be submitted in the quotation or proposal;
- The quote/proposal validity period required;
- Clearly defined quotation/proposal evaluation criteria;
- Anticipated terms and conditions that will apply to the contract (e.g., services agreement template available upon request or attached to RFP);
- The email address for submission which should be a central/general, non-personal account. See below note on Communication with Suppliers

Solicitations may be categorized as follows:

Request for Quotations. A Request for Quotations (RFQ) is generally used for the procurement of goods, works and non-consulting services. Staff should use an RFQ when the requirements for the purchase are definitive, pricing is known and is stable and competition is expected. Equipment specifications should only include the technical requirements for the equipment and may not include brand names, make or model.

Request for Proposals. A Request for Proposals (RFP) generally requires the supplier to submit a

detailed technical proposal describing how it proposes to meet the stated requirements and a detailed cost estimate. The RFP describes the selection process and timeline. RFPs should be published to allow the widest distribution and maximum competition and should provide the suppliers with adequate time to respond; for Tier 3 procurement, no less than three weeks.

Request for Expressions of Interest. An Expression of Interest (EOI) is a multi-staged procurement process used when seeking to shortlist potential suppliers before then seeking detailed bids. A Request for Expressions of Interest includes a description and objective of the assignment and a set of pre-qualification requirements that must be met in order for interested parties to be short-listed. Once an EOI is reviewed, a short-list is prepared and only the pre-qualified suppliers are issued the RFP and invited to submit detailed bids.

Communication with Suppliers during Solicitation. The email address used to communicate with suppliers and for submission of proposals should be a central/general, non-personal account whenever possible. Any responses to questions related to the bid which are not addressed in the RFQ or RFP must be provided to all suppliers to whom the RFQ or RFP was addressed. Any additional information concerning any solicitation must be made available to every supplier or proposer.

The Grants and Contracts Department and General Counsel's Office can help a Procurement Lead with how to share and distribute solicitations and clarifications that may require disclosure of confidential information.

Evaluation and Selection

Resources

[Bid Comparison Matrix](#)

[Selection Memo](#)

[Winning Bid Template](#)

[Unsuccessful Bid Template](#)

The quotations or proposals received from suppliers should be evaluated against the evaluation criteria specified in the solicitation. No evaluation criteria other than those previously specified may be used. If a pre-qualification process was completed, suppliers will not be evaluated again on the criteria used in the pre-qualification.

A Bid Comparison Matrix will be used to score the proposals. Pass/fail criteria may be used for procurement of off-the-shelf goods, simple equipment and similar items. Weighted scoring is used to evaluate competitive solicitations seeking the best value for money where technical and financial

criteria are both assessed.

Selection Panel. A selection panel will be required for Tier 3 procurements and above. The selection panel should be comprised of a minimum of 3 people. Selection panelists should be identified, and their commitment secured for review of proposals prior to posting the RFP. If a selection panel is formed to evaluate an RFP, members can review and score the proposals as a group or individually but should meet at least once to discuss the procurement and analyze the bids. Minutes or recording of the selection panel meetings are part of the procurement documentation to be kept on file.

The panel should review whether each proposal provides all the information requested in the solicitation and meets all the minimum criteria. If not, a bid should be deemed non-responsive and excluded from consideration. The most important aspect of the review process is ensuring that evaluation is based on the specifications and criteria outlined in the solicitation.

Selection panelists must sign the Conflict of Interest statement on the Bid Comparison Matrix. Selection panel members must remain impartial, refrain from discussing the proposals with other members outside of the selection panel meetings, refrain from contacting or responding to inquiries from suppliers and keep all proposal information confidential.

In the case of Tier 3 procurements, a Selection Memo is required.

Selection Memo. The Selection Memo is prepared by the Procurement Lead in collaboration with the Project Lead/Buyer. The Selection Memo details the procurement process, the bids received, the evaluation process including minutes from the selection panel, the bid comparison matrices, and the final selection. Its purpose is to record each step in the procurement process, the chronology, the evaluation and selection process, the final recommendation and any other background information that should be part of the formal record.

Notice of Award to Suppliers. The Procurement Lead will send a written notice of bid acceptance to the successful supplier and notice of non-award to the unsuccessful suppliers.

Solicitation and Evaluation Documentation Requirements by Tier

- **Tier 1, Micro purchase:** Purchases less than the value of the micro purchase threshold can be non-competitive if the quoted price is reasonable and provided that purchases are not split to avoid the requirements for competition above the Tier 1 threshold. Purchases must be equitably distributed among qualified suppliers to the extent practical.

Procurement documentation must include:

1. Terms of Reference (TOR) for consulting services; Or

- Purchase Order for goods/equipment
2. Supplier quote/ bid on letterhead or CV and hourly/daily rates (for consulting services)

- **Tier 2, Simplified Procedure:** In the simplified procedure, three quotations or proposals are obtained from qualified sources and scored by a minimum of two people in the case of consulting services, or evaluated by the Procurement Lead, in the case of goods/equipment. For the Simplified Procedure, a targeted solicitation to suppliers is the competition requirement and CI must receive 3 proposals. There is no requirement to post an RFP publicly and there is no requirement to convene a Selection Panel.

Procurement documentation must include:

1. Terms of Reference (TOR) for consulting services; Or
Purchase Order for goods/equipment
 2. Supplier quote/ bid on letterhead or CV and hourly/daily rates (for consulting services)
 3. Communications with suppliers
 4. Bid Comparison Matrix/Matrices
- **Tier 3, Formal Procedure.** Procurements above the value of Tier 3 must be conducted in a free and open competitive process that publishes a formal RFP or RFQ. RFPs and RFQs are widely disseminated and publicly advertised for a minimum of three weeks. A Selection Panel with a minimum of three people is convened to score and evaluate proposals. Selection is memorialized in a Selection Memo.

Procurement documentation must include:

1. Terms of Reference (TOR) for consulting services; Or
Purchase Order for goods/equipment
2. Request for Proposals (RFP) for consulting services; Or
Request for Quotations (RFQ) for goods/equipment
3. Evidence of posting including any posted amendments or clarifications
4. Supplier proposals
5. Communications with suppliers
6. Bid Comparison Matrices
7. Selection Memo
8. Selection Panel meeting minutes or recording
9. Bid Acceptance / Declined Letters

Contracting

For instruction and guidance on contracting, please see the Grants and Contracts Procedures Manual [here](#).

Preferred Vendors

Purpose and Conditions

The purpose of having a preferred vendor list (PVL) is to simplify the purchasing process for regular, ongoing, supplies and services. Preferred vendors allow CI to secure favorable contract conditions including best pricing, trust of vendors, flexible payment terms. In a preferred vendor relationship, CI has leverage over contract terms.

When is a Preferred Vendor List appropriate?

- ✓ When we are able to reasonably anticipate our procurement requirements on a long-term basis.
- ✓ When the services or goods provided are generally routine and uniform, and will be purchased on a regular, recurring, long-term basis.

When there are multiple qualified vendors and enough opportunity for CI to award multiple contracts over a long-term basis Examples include: office supplies, translation services, vehicle maintenance, copier maintenance, office cleaning services.

PVLs are generally not used for consulting services since most are specialized and specific to a one-time project need. However, it is possible to follow the PVL process to short-list or pre-qualify consultants for recurring work, where the scope of work justifies it. It can be justified where the scope of work is the same each time or requires a fixed methodology and quick deployment of services. For example: GEF ProDoc development. Always reach out to your Grants and Contract Department point of contact to determine if pre-qualification is relevant and how to best procure for the services.

Selection of a preferred vendor does not preclude CI from engaging alternative vendors or suppliers for other one-time procurements.

Procedure: How to Develop and Manage a Preferred Vendor List

Resources

[Preferred Vendor List Form Package](#)

After developing a list of the goods and non-consulting services that your office purchases on a regular, recurring basis, follow the procedures for Tier 3 Procurement.

The Procurement Lead must list in the RFQ any required forms to be submitted by potential suppliers, such as the Preferred Vendor Registration Form.

From the submitted bids, a selection panel will narrow the list down to only those vendors that meet the office's needs. The result will be a short list of qualifying vendors, which may be ranked in order of highest to lowest scoring. To confirm the existence and good standing of the selected vendors, a physical inspection visit may be made to validate the existence of the vendor and to confirm that all information included in the proposal is aligned with the business of such vendor. When physical inspection is not viable, conduct external reference checks and obtain a copy of the vendors operating license.

Programs may engage more than one preferred vendor in a particular service/product category if a single vendor is unable to meet all of their needs in an economical way. Upon selection of the vendor(s), proceed with contracting for a term no less than two years via CI's standard contracting procedures using either a purchase order or services agreement as described below. It is recommended that the PVL and contractual engagements be reviewed every two years to ensure the business processes are fair and transparent and to confirm the best pricing in the market.

The PVL should be reprocured within a reasonable time frame, and a maximum of 5 years, to make sure the list provides the best possible vendors. It is possible to refresh the list to add vendors periodically (annually or biannually). A key part of having a PVL is ensuring that there are opportunities for new vendors to be selected onto it, especially in a dynamic industry. The process for refreshing the list is something you consider while developing the solicitation.

In addition, if vendors on PVL consistently do not meet your purchasing needs or are cost prohibitive, consider alternatives, including reopening the PVL procurement. For goods or services not covered by original PVL, follow the procurement policy for one-off purchases according to threshold. Vendors on PVL list will also be eligible to apply.

Appendix 1: Summary of Procurement Process by Tier

Tier 1 Micro-purchase: US less than \$10,000 / Field: Determined locally

Tier 1 purchases may be made without obtaining competitive proposals or quotations provided the price is fair and reasonable. To the extent practical, these purchases should be distributed equitably among qualified suppliers in the local area and should not be split to avoid the requirements for competition above the Tier 1 threshold

Solicitation

- Request price/quote on supplier letterhead or CV and daily/hourly rate for consulting services

Evaluation/Selection

- Confirm price reasonableness

Award/Contracting

- Purchase Goods/Services, execute Purchase Order or Services Agreement, if applicable

Monitoring

- Goods Received Note or Acceptance of Deliverables
- Review invoices and performance reports submitted by the service provider
- Obtain reasonable assurance that services billed have been delivered according to the contract

Close Down

- Process all pending payments, invoices, reimbursables
- Ensure all documentation is in Business World

Tier 2 Simplified Procedure: US: \$10,001 to \$50,000 / Field: Determined locally

Obtain a minimum of three proposals or three quotations solicited from qualified suppliers or service providers. Proposals for consulting services are scored using the Bid Comparison Matrix by a minimum of two people. Quotations for supplies and equipment may be evaluated by the Procurement Lead using the Bid Comparison Matrix.

Solicitation

- Buyer develops Terms of Reference (TOR) including definition of deliverables (services) or product specifications (goods/equipment) and drafts RFP
- Procurement Lead reviews, edits and approves final RFP
- Procurement Lead solicits a minimum of 3 official quotes or proposals via Request for Quotation or Request for Proposals (public posting not required)
- Suppliers submit written quotes or proposals on supplier's letterhead

Evaluation / Selection

- Procurement Lead reviews all submissions for eligibility and screens for conflict of interest, former employee, government employee and prior history with CI
- Procurement Lead develops Bid Comparison Matrix using criteria from RFQ/RFP
- For procurement of goods, Procurement Lead completes Bid Comparison Matrix based on quotations received
- For procurement of services,
 - Procurement Lead obtains evaluation of proposals from two people who complete the Bid Comparison Matrix and the
 - Procurement Lead calculates the highest scoring proposal based on the two completed Matrices
- Procurement Lead notifies successful and unsuccessful bidders

Award/Contracting

- Procurement Lead negotiates final price with supplier and creates purchase order or services agreement
- Procurement Lead creates or verifies existing VMF in BusinessWorld
- Procurement Lead creates CMF in Business World (services)
- Procurement Lead uploads RFQ/RFP, all communication with suppliers, all quotations or proposals, Bid Comparison Matrices and to Business World
- Procurement Lead processes purchase order, contract or services agreement through appropriate module in Business World and secures approvals and signatures as appropriate

Monitoring

- Receiver documents receipt of goods or services. For goods, a delivery receipt is typically provided (Goods Received Note). For services, documentation of receipt is indicated through technical lead's approval of consultant deliverables email uploaded in the Business World CMF
- Review invoices and performance reports submitted by the service provider
- Obtain reasonable assurance that services billed have been delivered according to the contract
- Perform on site reviews, when appropriate, to check the nature and quality of the services being provided
- Maintain regular contact with the service provider and make appropriate inquiries concerning project activities

Close Down

- Process all pending payments, invoices, reimbursables

Ensure all procurement documentation is in Business World

Tier 3 Formal Procedure: US: \$50,001 and up / Field: Determined locally

Free and open competitive procurement that publishes a formal Request for Proposal (RFP). RFPs are widely disseminated and publicly advertised for a minimum of three weeks. A selection panel with a minimum of three people is convened to score and evaluate proposals. Selection is memorialized in a Selection Memo.

Solicitation

- Buyer develops Terms of Reference (TOR) including definition of deliverables (services) or product specifications (goods/equipment) and drafts RFP
- Procurement Lead reviews, edits and approves final RFP
- Procurement Lead disseminates RFP by posting/publishing in public websites/newspapers, including on CI's website. If deemed necessary, the RFP will be posted on international websites or in international publications to ensure maximum competition.
- The RFP should be posted for at least three weeks and extended if a minimum of 3 proposals are not received.
- Suppliers submit written proposals and all supporting documentation per instructions in RFP

Evaluation / Selection

- Procurement Lead reviews all submissions for eligibility and screens for conflict of interest, former employee, government employee and prior history with CI
- Procurement Lead develops Bid Comparison Matrix using criteria from RFQ/RFP
- Procurement Lead distributes proposals and Bid Comparison Matrix to proposal evaluators with instructions on the proposal review process.
- Proposal evaluators review proposals, complete and sign the Bid Comparison Matrix and return to the Procurement Lead
- Procurement Lead convenes Selection Panel (virtually or in-person) to review and score proposals using the Bid Comparison Matrix.
- Procurement Lead writes Selection Memo documenting rationale for selection per the Selection Panel's input
- Procurement Lead notifies successful and unsuccessful bidders

Award/Contracting

- Procurement Lead negotiates final price with supplier and creates services agreement
- Procurement Lead creates or verifies existing VMF in BusinessWorld
- Procurement Lead creates CMF in Business World (services)
- Procurement Lead uploads RFP, evidence of postings, all communication with suppliers, all proposals, Bid Comparison Matrices and to Business World
- Procurement Lead processes services agreement through appropriate module in Business World and secures approvals and signatures as appropriate

Monitoring

- Technical lead documents approval of consultant deliverables, email uploaded in the Business World CMF
- Review invoices and performance reports submitted by the service provider
- Obtain reasonable assurance that services billed have been delivered according to the contract
- Perform on site reviews, when appropriate, to check the nature and quality of the services being provided
- Regular contact with the service provider and make appropriate inquiries concerning project activities

Close Down

- Process all pending payments, invoices, reimbursables

Ensure all procurement documentation is in Business World

Version Control: Version 2.0

Version	Date	Description	Approved (CFO or Delegate)	Posted on Intranet
1.0	November 21, 2019	First Finalized Version		January 2019
1.1	September 20, 2019	Incorporate GEF and GCF requirements; define applicability to Internal Donors; define applicability to sub-recipients; publication requirement for GEF/GCF >\$50K		September 2019
1.2	August 2020	Revision for GEF Fiduciary Assessment: 1. Inclusion of requirement to treat bidding information as confidential: "All proprietary information provided by the bidder/vendors/service providers should be treated as confidential and may not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost	August 5, 2020	

		<p>proposals and technical proposals. CI may post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. “</p> <ol style="list-style-type: none"> 2. Inclusion of Dispute Resolution Policy 3. Inclusion of Social and Environmental statement: “CI considers environmental, social and economic impacts through its selection of goods and services while also maintaining a competitive and fair procurement environment. CI respects and enforces the environmental, social, and labor standards recognized by the international community and in line with local law. CI Staff are encouraged to re-use goods when able, and are encouraged to purchase recycled content materials, and environmentally preferable products. CI staff and sub-recipients are encouraged to seek suppliers that share this commitment in their corresponding business operations.” 4. Internal link to Procurement Plan template 5. Sole Source: “Before engaging in sole source procurement, the Project Lead is encouraged to expand the RFP/RFQ beyond the local market and to advertise the procurement opportunity in a wide and diverse set of publications online, in print, social media and trade or industry specific platforms for communications.” 6. Procurement Process Standards, Fairness and Integrity: “If RFPs provide bidders an opportunity to submit questions about the solicitation the Procurement Lead must document all questions received from all of the vendors, and share the Q&A with all of the other bidders.” 7. Communication with unsuccessful offerors: “Once an award is made, the Procurement 		
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		Lead should notify the unsuccessful bidders in writing that their bid/proposal was not selected. For highly complex awards, CI may conduct a debriefing upon request from the unsuccessful bidder. The debriefing can be delivered verbally or in writing and is limited to the identification of strengths and weaknesses in the bidder's proposal."		
2.0	July 2021	Updated Tiers + See document, "Detailed List of all changes to the Procurement Policy and Guidelines July 2021"		