Date: July 30, 2021 (Originally posted June 29, 2021)

**Request for Proposals # FY2022-CIPO-001**

Dear Sir or Madam,

Conservation International Foundation (hereinafter referred to as “Conservation International”), is issuing a Request for Proposals (RFP) for **Global Benefits Data Collection and Analysis**. The attached RFP contains all the necessary information for interested Offerors.

The award will be in the form of Firm Fixed Price Contract (hereinafter referred to as “the Contract”). The successful offeror(s) shall be required to adhere to the Code of Ethics, statement of work, and the terms and conditions of the Contract.

Over the past thirty years, Conservation International’s local teams across twenty-seven countries have established benefit packages. Conservation International is requesting the support of an external party to conduct a data collection, review of statutory requirements and customary benefits offered within the non-profit sector of each country, gap analysis, and finally, propose solutions for any gaps in our global benefits package. This work aligns to institutional efforts to elevate our organizational standard of care and prioritize local diversity, equity, and inclusion principles.

Offerors should submit a proposal by sending an email indicating their intention to CI Procurement at ciprocurement@conservation.org by 11:59pm EDT (UTC-04:00) on August 20, 2021.

All offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work and in accordance with CI’s Code of Ethics.

*Conservation International’s reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, and 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 should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com)*

*Concerns regarding the integrity of the procurement process and documents shall be reported to [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com) under the procurement and purchasing activities.*
Request for Proposals

RFP # FY2022-CIPO-001

For the provision of

Global Benefits Data Collection and Analysis

Contracting Entity:

CI People Operations
Section 1. Instructions and General Guidance

1.1 Introduction

CI, the Buyer, is soliciting offers from Offerors to submit proposals to carry out Global Benefits Data Collection and Analysis.

At the conclusion of the Global Benefits Data Collection and Analysis contract assignment, CI will know where it stands in the market and how to specifically improve or modify its global benefits package and strategy with respect to the following organizational objectives:

OBJECTIVES:

- Comply with relevant legislation and regulations
- Adequately supplement available social security benefits
- Meet competitive practice and custom in each country
- Complement the company’s overall remuneration strategy
- Are cost- and tax-effective
- Create a specific organizational standard of care aligned to our global and local diversity, equity, and inclusion principles

This RFP does not obligate CI to execute a contract nor does it commit CI to pay any costs incurred in the preparation and 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.
**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.

### 1.2 Offer Deadline

Offerors shall submit their offers electronically at the following email address, ciprocurement@conservation.org.

Offers must be received no later than at **11:59pm EDT (UTC-04:00) on August 20, 2021**. Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may not be considered. CI cannot guarantee that late offers will be considered.

### 1.3 Instruction for Offerors

All proposals must be submitted in one volume on Offeror’s letterhead, consisting of:

- Technical proposal
- Cost proposal
- Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)

**Not included in RFP but available upon request.** Winning bidder will be required to sign before project can begin:

- CI’s Confidentiality Agreement (NDA)
- CI Policies for Non-Employee Acknowledgement
- CI Services Agreement template

1. Technical Proposal

The technical proposal shall comprise the following parts:

**Part 1: Technical Approach, Methodology and Detailed Work Plan.** This part shall be between 3 and 5 pages long.

The Technical Proposal should describe in detail how the offeror intends to carry out the requirement described in Section 2, Scope of Work (SOW). The technical proposal should demonstrate a clear understanding of the work to be undertaken and the responsibilities of all parties involved. The offeror should include details on personnel, equipment, and contractors who will be used to carry out the required services.

**Part 2: Management, Key Personnel, and Staffing Plan.** CVs for key personnel may be included in an annex to the technical proposal and will not count against the page limit. The Technical Proposal should include CV(s) for the following:
Corporate Capabilities, Experience, Past Performance, and references. Include relationships with external regional/local brokers and benefit providers. This part shall be between 2 and 4 pages long.

2. Cost Proposal
Offerors shall use the cost proposal template (Attachment 2). Supporting information must be provided in sufficient detail to allow for a complete analysis of each cost element or line item. CI reserves the right to request additional cost information if the evaluation committee has concerns of the reasonableness, realism, or completeness of an offeror’s proposed cost. Bids will be valid for 120 days from submission.

1.4. Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Originally Published</td>
<td>Tuesday, June 29</td>
</tr>
<tr>
<td>RFP Re-Posted</td>
<td>Friday, July 30</td>
</tr>
<tr>
<td>Second Round Deadline for written questions</td>
<td>Friday, August 6</td>
</tr>
<tr>
<td>Q&amp;A Shared with All Vendors</td>
<td>Friday, August 13</td>
</tr>
<tr>
<td>Proposal due date</td>
<td>Friday, August 20</td>
</tr>
</tbody>
</table>

If 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. CI may request finalists participate in an interview prior to CI’s selection. CI anticipates the contract would begin September 1.

1.5. Evaluation and Basis for Award

In evaluating proposals, CI will seek the best value for money considering the merits of the technical and costs proposals. Proposals will be evaluated using the following criteria:

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Total Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I Technical Proposal Part I - Technical Approach, Methodology, and Detailed Work Plan</strong></td>
<td></td>
</tr>
<tr>
<td>1 Does the proposal clearly explain, understand and respond to the objectives of the project as stated in the Scope of Work?</td>
<td>15</td>
</tr>
<tr>
<td>2 Does the proposed program approach and detailed activities and timeline fulfill the requirements of executing the Scope of Work effectively and efficiently?</td>
<td>20</td>
</tr>
<tr>
<td>3 Does the proposal demonstrate the offeror’s knowledge related to technical sectors required by the SOW? Address any relationships with external regional/local brokers and benefit providers.</td>
<td>20</td>
</tr>
<tr>
<td><strong>II Technical Proposal Part II - Management, Key Personnel, and Staffing Plan</strong></td>
<td></td>
</tr>
<tr>
<td>4 Personnel Qualifications – Do the proposed team members have necessary experience and capabilities to carry out the Scope of Work?</td>
<td>10</td>
</tr>
<tr>
<td><strong>III Technical Proposal Part III - Corporate Capabilities, Experience, Past Performance, and references</strong></td>
<td></td>
</tr>
</tbody>
</table>
5  Company Background and Experience – Does the company have experience relevant to the project Scope of Work?  20

IV  Cost Proposal- Cost- Includes (Travel, Fee, Charges, any other expenses)

6  Cost: Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment.  15

Section 2.  Scope of Work, Deliverables, and Deliverables Schedule

2.1.  Scope of Work
The consultant will evaluate each of CI’s country offices against the following institutional objectives for CI’s global benefits program:

Key Objectives
- Comply with relevant legislation and regulations
- Adequately supplement available social security benefits
- Meet competitive practice and custom in each country
- Complement the company’s overall remuneration strategy
- Are cost- and tax-effective
- Create a specific organizational standard of care aligned to our global and local diversity, equity, and inclusion principles

Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Staff Count</th>
<th>Country</th>
<th>Staff Count</th>
<th>Country</th>
<th>Staff Count</th>
<th>Country</th>
<th>Staff Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>6</td>
<td>Colombia</td>
<td>40</td>
<td>Japan</td>
<td>8</td>
<td>Peru</td>
<td>46</td>
</tr>
<tr>
<td>Belgium</td>
<td>13</td>
<td>Costa Rica</td>
<td>10</td>
<td>Kenya</td>
<td>26</td>
<td>Philippines</td>
<td>28</td>
</tr>
<tr>
<td>Bolivia</td>
<td>18</td>
<td>Ecuador</td>
<td>43</td>
<td>Liberia</td>
<td>13</td>
<td>Samoa</td>
<td>4</td>
</tr>
<tr>
<td>Botswana</td>
<td>2</td>
<td>Fiji</td>
<td>17</td>
<td>Madagascar</td>
<td>115</td>
<td>Singapore</td>
<td>25</td>
</tr>
<tr>
<td>Brazil</td>
<td>72</td>
<td>Germany</td>
<td>&lt;10</td>
<td>Mexico</td>
<td>30</td>
<td>South Africa</td>
<td>94</td>
</tr>
<tr>
<td>Cambodia</td>
<td>42</td>
<td>Guyana</td>
<td>28</td>
<td>New Caledonia</td>
<td>4</td>
<td>Suriname</td>
<td>17</td>
</tr>
<tr>
<td>China</td>
<td>12</td>
<td>Indonesia</td>
<td>100</td>
<td>New Zealand</td>
<td>7</td>
<td>Timor Leste</td>
<td>21</td>
</tr>
<tr>
<td>France</td>
<td>&lt;10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Consultant will collect existing data from each country office including:

Benefits
- Social Security
- Retirement Benefits
- Termination
- Death Benefits (Life)
- Accident
- Sickness
- Disability
- Medical
- Dental
- Vision
- Leave (including Maternity/Paternity/Parental benefits)
- Social
- Perquisites and Allowances
- Flexible Benefits Program

<table>
<thead>
<tr>
<th>Activity</th>
<th>Deliverables</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. DATA COLLECTION</td>
<td></td>
<td>Anticipated period of performance of 12 to 18 months.</td>
</tr>
<tr>
<td>1. <strong>CI current standard of care:</strong> Conduct an assessment of the current state of CI's benefit plans by country, including cost analysis of all benefits.</td>
<td>A summary of all current benefits, eligibility rules, and local statutory requirements in each country.</td>
<td>Draft report provided at mid-point to check in on progress, quality, and approach.</td>
</tr>
<tr>
<td>2. <strong>Local statutory requirements:</strong> Determine the local statutory requirements of each country.</td>
<td></td>
<td>Payment processed on final summary delivered.</td>
</tr>
<tr>
<td>3. <strong>Benchmark best competitive practice:</strong> Engage with pre-established CI brokers in country to determine local, competitive practice of each country and in the nonprofit sector. If CI brokers are not available, the vendor would consult with their own network.</td>
<td>A summary of all current benefits, eligibility rules, and local statutory requirements in each country.</td>
<td>Draft report provided at mid-point to check in on progress, quality, and approach.</td>
</tr>
<tr>
<td>II. ANALYSIS</td>
<td></td>
<td>Anticipated period of performance of 6 months.</td>
</tr>
<tr>
<td>Conduct a gap analysis outlining: 1. Noncompliance – CI is not meeting local labor law. 2. Non-competitiveness – CI is not competitive with local, nonprofit organizations. 3. Inequity – CI is inconsistent across country programs in offering benefits. The reports must also include the steps needed to take to fill those gaps. Provide recommendations for renewals.</td>
<td>A summary report outlining the recommended steps needed to be taken to meet the local statutory requirements and to be competitive locally and in the nonprofit sector for each country.</td>
<td>Payment processed on final summary delivered.</td>
</tr>
<tr>
<td>III. IMPLEMENTATION</td>
<td></td>
<td>Anticipated period of performance of 6 months.</td>
</tr>
<tr>
<td>Implement the necessary steps to close the gaps: 1. Coordinate and manage the implementation of the agreed to plans identified in Phase II in each country. 2. Coordinate the implementation with local insurers, providers, employees, and local management. 3. Engage with local brokers when necessary to provide services for a successful implementation.</td>
<td>A summary report of the implementation steps for each country. An updated summary of all current benefits, eligibility rules, and local statutory requirements in each country.</td>
<td>Payment processed on final summaries delivered.</td>
</tr>
</tbody>
</table>
A Benefits Guide by country, to be distributed internally to staff.
Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility

RFP No. FY2022--CIPO-001

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.

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 scope of work 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”.

Name: _____________________________________________

Signature: _____________________________________________

Title: _______________________________________________

Date: _______________________________________________
Attachment 2: 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 detailed budget showing major expense line items. Offers must show unit prices, quantities, and total price. 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 by Deliverable

<table>
<thead>
<tr>
<th>Activity</th>
<th>Deliverable</th>
<th>Price per Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I: Data Collection</td>
<td>A summary of all current benefits, eligibility rules, and local statutory requirements in each country.</td>
<td>To be completed by bidder</td>
</tr>
<tr>
<td>Phase II: Analysis</td>
<td>A summary report outlining the recommended steps needed to be taken to meet the local statutory requirements and to be competitive locally and in the nonprofit sector for each country.</td>
<td>To be completed by bidder</td>
</tr>
<tr>
<td>Phase III: Implementation</td>
<td>A summary report of the implementation steps for each country. An updated summary of all current benefits, eligibility rules, and local statutory requirements in each country. A Benefits Guide by country, to be distributed internally to staff.</td>
<td>To be completed by bidder</td>
</tr>
</tbody>
</table>

Cost Breakdown by Cost Component (example only)

<table>
<thead>
<tr>
<th>Description</th>
<th>Unit of measure (day, month etc)</th>
<th>Total period of engagement</th>
<th>Unit cost/rate</th>
<th>Total Cost for the Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-total Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Costs (if applicable)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other related Costs (please specify)</td>
<td></td>
<td></td>
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</tbody>
</table>

Total Cost of Financial Proposal