



Request for Proposals (RFP)

Title: Fellowship Program Evaluation

RFP No.: 01-CI Fellows-Evaluation

Date of Issuance: 17 August 2023

Conservation International (CI) is pleased to announce the release of this Request for Proposal (RFP) for conducting a comprehensive program evaluation for CI's Fellowship programs. We are seeking proposals from qualified evaluation firms or individuals to assess and provide recommendations on the effectiveness, efficiency, and impact of the Fellowship programs.

Interested offerors should indicate their interest in submitting a proposal for the anticipated agreement by sending an email to ciprocurement@conservation.org 5:00PM (EDT) September 11, 2023.

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.

1. Background

Since 1987, Conservation International has worked to spotlight and secure the critical benefits that nature provides to humanity. Combining fieldwork with innovations in science, policy and finance, we've helped protect more than 6 million square kilometers (2.3 million square miles) of land and sea across more than 70 countries. CI is currently implementing a campaign through 2025 to achieve ambitious impact targets to stabilize our climate by protecting and restoring nature, doubling ocean protection, and expanding planet-positive economies.

At Conservation International we believe that investing in talent is fundamental to our mission and key to providing sustainable solutions. In that spirit, we established the Arnhold, Lui-Walton and Friedman Fellowship programs to host conservation fellows — academics, scientists, public and private sector leaders, independent scholars and policy analysts — who work to create dynamic and unconventional approaches to address existing barriers to sustainability and contribute to a shift in how nature is valued. These fellowships provide unparalleled opportunities for intensive focus and achievement at the intersection of climate, conservation, business, and technology.

The programs engage recognized leaders — Distinguished and Senior Fellows — and emerging talent — Technical Fellows — to provide fresh thinking and extensive leadership to Conservation International's work around the world. By strategically combining the skills and knowledge of both groups, the fellows are able to expand the breadth of their skills, gain valuable experience in their fields, and find innovative solutions together with Conservation International program staff and local partners.

2. Project Overview

To fulfill our mission of working with societies to responsibly and sustainably care for nature, we invest in exceptional thinkers, innovators and leaders through our three fellowship programs. Each opportunity offers fellows the chance to tackle critical global conservation issues with the support of CI's unparalleled resources.

This program evaluation will assess the effectiveness of the programs in achieving the intended outcomes, evaluate the efficiency of the program in terms of resource allocation and utilization, determine the impact of the programs, identify strengths and weaknesses of the program and provide recommendations for improvement in all areas.

The program has funded the work of more than 50 Fellows, employing about \$20M in resources from 2017 to August, 2023.

Arnhold Distinguished Fellowship

Donors: John Arnhold – in honor of Henry Arnhold

This unique fellowship program enlists visionaries and leaders to elevate the climate and conservation dialogue to the highest levels of government and industry, helping to create the political space for diplomacy and bold action on some of the most pressing challenges of our times.

Lui-Walton Innovators Fellowship

Donors: Rob and Melani Walton and Yvonne Lui

To fulfill our mission of working with societies to responsibly and sustainably care for nature, we invest in exceptional thinkers, innovators and leaders through our Lui-Walton Innovators Fellowship. Ranging from former ministers and industry leaders to emerging technical leaders, our Fellows help tackle critical challenges in global conservation with the support of CI's unparalleled resources.

Friedman Fellows

Donors: Ann and Tom Friedman

The Ann and Tom Friedman Fellows for Science Program recognizes and supports the key role that science plays in achieving Conservation International's conservation goals. Supported by CI's vast network of staff and partners, these scientists effectively advance their research and its application on the ground in our priority regions around the world.

3. Terms of Reference, Deliverables and Deliverables Schedule

The selected consultant will be expected to carry out a series of interviews with key stakeholders to assess perspectives of the program. A list of stakeholders will be provided by CI. Key questions by audience are outlined in the table below and are subject to change.

We anticipate that all meetings will be virtual. No travel or in person meetings are planned.

#	Activities	Deliverables	Key Questions by Audience
1	Project kickoff . Introduce team members and review evaluation timeline and expectations.	Kickoff meeting presentation and meeting summary, inclusive of workplan and interview and data collection approach.	
2	Organizational Perspective Conduct interviews on institutional awareness, analyze data and provide suggestions.	Demonstration of meetings held with identified participants. Brief summary of main takeaways.	<ul style="list-style-type: none"> ○ What has been the overall impact of the program? Has it met the objectives established for each type of Fellow? ○ Have the Fellows been leveraged in a strategic way? ○ How can we improve engagement opportunities? ○ How could we attract more strategic Fellows? ○ Is there internal awareness of the program, and understanding how to engage our Fellows? ○ Is the program recognized for attracting outstanding talent to CI?
3	External Reputation Conduct interviews with peer NGOs on external presence, analyze data and provide suggestions.	Demonstration of meetings held with identified participants. Brief summary of main takeaways.	<ul style="list-style-type: none"> ○ Is the program recognized for attracting outstanding talent to CI?
4	Fellows' Perspective Conduct interviews on program effectiveness, analyze data and provide suggestions.	Demonstration of meetings held with identified participants. Brief summary of main takeaways.	<ul style="list-style-type: none"> ○ How was your overall experience? ○ Did you feel your expertise was appropriately utilized? ○ What achievements were accomplished with your time as a Fellow? ○ Did you feel supported by CI?
5	Fellowship Program Perspective Conduct interviews on program management, analyze data and provide suggestions.	Demonstration of meetings held with identified participants. Brief summary of main takeaways.	<ul style="list-style-type: none"> ○ Is the Fellowship program sufficiently staffed to get maximum value out of Fellowship engagement? ○ What is required for internal buy-in and consistently successful Fellowship appointments? ○ What is required of CI leadership and Fellowship focal points to ensure strategic engagement of each Fellow?

<p>6 Summarize impact of the program and suggest opportunities and recommendations for strengthening program effectiveness, institutional awareness, strategic management and external presence.</p>	<p>Conclusion report that includes a summary of interview process, method of data analysis, a resulting assessment of the effectiveness per program, and suggestions or recommendations for.</p>	
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4. Submission Details

- a. Offerors shall submit their offers to ciprocurement@conservation.org no later than 5:00PM (EDT) September 11, 2023.
- b. All proposals are to be submitted following the guidelines listed in this RFP.
- c. Validity of bid. 120 days from the submission deadline
- d. Clarifications. Questions may be submitted to ciprocurement@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.
- e. 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. Direct experience performing similar program evaluations, of similar scale, for no less than 3 conservation organizations
- b. Direct experience advising clients with international offices
- c. Ability to conduct interviews and focus groups outside of standard business hours
- d. Minimum of 7-10 years' experience in qualitative data collection and analysis
- e. Proficiency in English

6. Proposal Documents to Include

- a. Signed cover page on bidder's letterhead with the bidder's contact information.
- b. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)
- c. Technical Proposal.
 - i. Corporate Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
 - ii. Qualifications of Key Personnel. Please attach CVs that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).

- iii. Technical Approach, Methodology and Detailed Work Plan. The Technical Proposal should describe in detail how the bidder intends to carry out the requirements described in the Terms of Reference (Section 3)
- d. Financial Proposal. Offerors shall use the cost proposal template (Attachment 2).

7. Evaluation Criteria In evaluating proposals, CI will seek the best value considering the merits of the technical costs of the proposals. Proposals will be evaluated using the following criteria:

Evaluation Criteria	Score (out of 100)
Is the proposed approach and methodology appropriate to the assignment and practical in the prevailing project circumstances?	30%
Is the presentation clear and is the sequence of activities and the planning logical, realistic and promise efficient implementation to the project?	20%
Does the bidder’s past performance demonstrate recent proven experience doing similar work?	20%
Does the bidder and the proposed personnel have the specific technical expertise for the assignment?	20%
Cost: Consulting hours proposed are reasonable and realistic, reflect a solid understanding of the assignment.	5%
Cost: Hourly rates of personnel categories proposed are reasonable for the level of experience and project responsibility	5%

8. Proposal Timeline

RFP Issued	17 Aug 2023
Clarifications submitted to CI	28 Aug 2023
Clarifications provided to known bidders	4 Sept 2023
Complete proposals due to CI	11 Sept 2023
Final selection	18 Sept 2023

9. Resulting Award CI anticipates entering into an agreement with the selected bidder by September 22, 2023. 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.

This RFP does not oblige 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.

10. 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.

11. 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. 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.

12. Attachments:

Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility
Attachment 2: Cost Proposal Template

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

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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".

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

Deliverable	Unit Cost	# Units	Price (Lump Sum, All Inclusive)	Comments/ Notes
Project kickoff				
Organizational Perspective Interviews				
External Reputation Interviews				
Fellows' Perspective Interviews				
Fellowship Program Perspective Interviews				
Final Conclusion Report				