

Request for Proposals

Title: Climate Positive Initiative

RFP No: 12132023

Date of Issuance: December 13, 2023

Amended: January 26, 2024 (See Sections 4, 8, & 9)

1. Background

Since 2006, Conservation International (CI) has taken steps to reduce our organizational impact on the climate, from achieving LEED certification of our largest operations to purchasing carbon credits to address the emissions from our travel, office rent and energy use. Following the global pandemic that has paused many normal business activities such as staff commuting; in person workshops, training, fundraising events, and international travel, CI reviewed our efforts and identified ways to go even farther to address our greenhouse gas footprint. Therefore, we had our organizational GHG inventory assessment completed by calculating our footprint for scopes 1, 2 and 3 (detailed below) for the fiscal years 2019 through 2022, setting 2019 as our baseline year. Understanding the urgency of addressing climate crisis, based on the findings of the most recent report of the Inter-Governmental Panel on Climate Change, CI wants to ensure that we remain on the leading edge of bold climate action alongside governments and corporations around the world increasing the ambition of climate commitments.

We believe defining an organizational roadmap to becoming “climate positive” is essential for us to demonstrate a leading climate change commitment and to serve as an example in our engagement with companies, governments, and others.

As a global leader in promoting Natural Climate Solutions (NCS) and with access to governments and corporations that are active in this space, it is critically important that CI is not only “walking the talk” but also able to serve as an effective resource for others. The Climate Positive Initiative enables us to do just that.

2. Project Overview

The purpose of this work is to update and improve CI’s greenhouse gas footprint for fiscal year 2023 (July 2022 - June 2023), including scopes 1 (stationary combustions, mobile combustion) and 2 (purchased electricity), plus all relevant and material categories of scope 3 (C1 Purchased goods & services, C6 Business Travel, C7 Employee Commuting & Work from home).¹

The footprint covers 57 of CI’s international offices and our remote employees. For this phase of the project, CI is seeking consultant support for key pieces of its footprint assessment (as outlined in Section 3):

This work also includes supporting Conservation International’s footprint reduction strategy.

GHG Footprint assessment for fiscal year 2023:

Timeframe: February 2024 – April 2024

Activities:

¹ An entity that is taking or causing action beyond carbon neutrality by removing GHGs from the atmosphere or reducing emissions to the atmosphere such that the aggregated reductions and removals exceed the unabated emissions from the subject.

- a) Internal consultation and data gathering (To be led by CCS team, with Consultant support)
- b) GHG footprint calculation for fiscal year 2023 for Conservation International using existing carbon footprinting Excel tool and retaining connection to CI's existing Power BI dashboard (To be lead by selected Consultant)
- c) Abatement Strategy support for CI's Climate Positive Initiative (To be led by selected Consultant)

3. Terms of Reference, Deliverables and Deliverables Schedule

The following tasks are envisioned to be undertaken by the successful consultant, producing the deliverables by the indicated deadlines. Proposals outlining the envisioned approach should not exceed 5 pages in length.

a. INITIAL ASSESSMENT, INTERNAL CONSULTATION, AND DATA GATHERING

Description: CI has established the organization's GHG inventory (based on available data) and data gathering templates developed by the Climate Positive team. Using the GHG Protocol (developed by WRI), the consultant will work with CI to confirm the scope of our organization's GHG emissions to be inventoried based on the established list of emission categories included in prior year GHG inventories. The consultant will recommend any changes to the scope of CI's GHG inventory if needed, although none are expected. The internal CI Climate Positive team will identify the key data providers and support collection of necessary data to calculate our GHG footprint based on process from prior years. The consultant will be responsible for checking/validating the data as it's collected through the data collection process, checking data for completeness and data quality, and following up with CI's Climate Positive team and/or data provider with any clarification questions within 1 month of receiving data. The list of emission categories for FY23 footprint calculation included in CI's GHG calculation model is summarized in Attachment 2. CI has a list of established data providers internally and externally; we therefore will support the consultant in obtaining all necessary information.

Deliverable: A PowerPoint with feedback on established data gathering process, gaps in inventory, and suggestions on where and how prioritize improvements in data quality.

Deadline: This feedback will be delivered 1 month from agreement signing.

b. CONSERVATION INTERNATIONAL'S GHG FOOTPRINT CALCULATION FOR FISCAL YEAR 2023

Description: The consultant will update CI's carbon footprint tool with FY2023 data, updated emissions factors, and any possible and justified improvements in methodology. Any material errors identified in previous inventory years should also be corrected if identified. The updated scope 1, 2, 3 emissions footprint will be prepared in line with the relevant GHG Protocol standards. The GHG footprint tool will be enhanced with data quality scoring and a simple uncertainty assessment in line with the GHG Protocol methodology to enable prioritization continuous improvement efforts.

Deliverables:

1. An updated version of the FY23 carbon footprint Excel tool with live links to the PowerBI Dashboard and additional data quality scoring and uncertainty assessment.
 - All key methodology, assumptions, and sources (including emissions factors and data gap filling approaches) should be included within this footprint document, or where more practical and useful, within well-structured, annotated, and consolidated separate documents to enable traceability and repeatability.
 - An illustrative report documenting the process of calculation to ensure CI's Climate Positive team understanding of step-by step approach taken should CI's independent data input need to occur in the future.
2. Observations & conclusions executive-ready report (PowerPoint) summarizing:
 - CI's GHG emissions profile based upon the GHG inventory, key hotspots, trends, and opportunities.
 - Assessment of data quality across the model, estimated uncertainty range based on data quality and recommended approach for improving data quality / decreasing footprint uncertainty
 - Any methodological or process improvement recommendations including potential tools/partners for improving data quality and process efficiency.

Deadline: Must be completed within 2 months of agreement signing.

c. ABATEMENT STRATEGY AND MITIGATION RECOMMENDATIONS

Description: The consultant will be tasked with reviewing the existing abatement model, providing recommended updates to model and assumptions within, and developing a report with strategy for addressing our key GHG hotspots.

Deliverables:

1. Updated Excel abatement model with any key assumptions validated or updated. Short memo summarizing changes made to model.
2. Business travel strategy recommendations (PowerPoint)
 - a. List of proposed mitigation activities
 - b. Peer benchmarking analysis of business travel mitigation strategies and results
3. Renewable energy sourcing strategy (PowerPoint) to achieve 100% renewable energy by 2030 (or sooner)
 - a. Summary of electricity use and projections
 - b. Summary of RE sourcing options
 - c. Analysis of renewable energy sourcing options in key geographies where Conservation International offices are operating
 - d. 2-3 scenarios for how CI could achieve 100% RE by 2030 or sooner including initial cost estimates
4. Review and discussion of annual footprint assessment results
 - a. A report (PowerPoint) with key recommendations on actions that Conservation International can start taking to reduce its footprint.
 - b. A meeting to review the results of the annual GHG footprint assessment with CI's Climate Positive team to discuss the mitigation pathways with the greatest opportunity.

Deadline: This will be completed 2.5 months from agreement signing.

4. Submission Details

- a. Deadline. Proposals must be received no later than **February 9 2024** at 5 pm EST. Late submissions will not be accepted. Proposals must be submitted via email to ciprocurement@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 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.
- 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. Previous expertise and demonstrated experience in GHG footprint assessments
- b. Advanced experience developing, quality checking and updating Excel models
- c. Data visualization skills allowing for update of existing CI's internal Power BI GHG dashboard
- d. Experience in development of organizational GHG abatement strategies and implementing relevant programs to those covered in task C.

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 3).

7. Evaluation Criteria

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:

Proposals will be evaluated **ONLY** against the Evaluation Criteria in the RFP (no other evaluation criteria may be considered for selection).

Evaluation Criteria	Score (out of 100)
Is the proposed approach and methodology appropriate to the assignment and practical in the prevailing project circumstances?	15%/ Max points
Is the presentation clear and is the sequence of activities and the planning logical, realistic and promise efficient implementation to the project?	10%/ Max points
Does the bidder's past performance demonstrate recent proven experience doing similar work?	15%/ Max points
Does the bidder and the proposed personnel have the specific technical expertise for the assignment?	30%/ Max points
Cost: Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment.	30%/ Max points

8. Proposal Timeline (Please add other solicitation events to this timeline if applicable such as interviews or demos).

RFP Issued	13 December 2023
Clarifications submitted to CI	19 December 2023
Clarifications provided to known bidders	2 January 2024
Complete proposals due to CI	9 February 2024
Final selection	23 February 2024

9. Resulting Award CI anticipates entering into an agreement with the selected bidder by 1 March 2024. 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 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.

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: List of emission categories for FY23 footprint calculation included in CI's GHG calculation model
Attachment 3: Cost Proposal Template

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

RFP No. **12132023**

D-U-N-S 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.

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: List of emission categories for FY23 footprint calculation included in CI's GHG calculation model

Scope 1	Stationary emissions
Scope 1	Vehicular emissions
Scope 2	Purchased Electricity
Scope 3	Purchased Goods & Services (C1)
Scope 3	Subgrant Partners (C1)
Scope 3	Upstream Transportation and Distribution (C4)
Scope 3	Electricity WTT (C3)
Scope 3	Fuel WTT
Scope 3	Business Travel_International Air (C6)
Scope 3	Business Travel_Fuel
Scope 3	Business Travel_Hotel and Others (C6)
Scope 3	Employee Commuting (C7)
Scope 3	Work from home (C7)

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 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 US dollars.

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	Price (Lump Sum, All Inclusive)
1. INITIAL ASSESSMENT, INTERNAL CONSULTATION, AND DATA GATHERING	
2. CONSERVATION INTERNATIONAL'S GHG FOOTPRINT CALCULATION FOR FISCAL YEAR 2023	
3. ABATEMENT STRATEGY AND MITIGATION RECOMMENDATIONS	

Cost Breakdown by Cost Component (example only)

Description	Unit of measure (day, month etc)	Total period of engagement	Unit cost/rate	Total Cost for the Period
Consultant 1				
Consultant 2				
Sub-total Personnel				
Travel Costs (if applicable)				
Other related Costs (please specify)				
Total Cost of Financial Proposal				