

**Request for Proposals**

**Title: Biodiversity Monitoring design for Nature Crediting: Yaguas**

**RFP No: FY24-015**

**Date of Issuance: May 13, 2024**

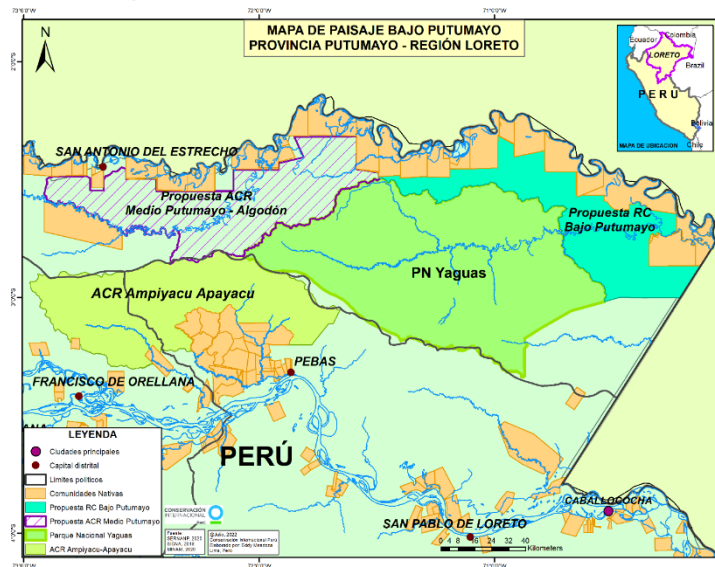
**1. Background**

Conservation International (CI) is currently exploring opportunities for sustainable finance at Yaguas National Park, Peru, one option of which may be biodiversity or nature credits.

Yaguas National Park accounts for 868,927.84 hectares and is considered a priority conservation site according to the National Park Service (SERNANP its Spanish acronym) map of prioritized sites. A rapid biological inventory carried out by The Chicago Field Museum and local partners in 2010, found that the area has the highest diversity of continental fish species in Peru (337 species) and an extremely high diversity of flora and fauna species.

In addition to its high biodiversity, the park contains tropical peatland-type ecosystems, which help improve water quality, soil erosion and carbon accumulation due to the high degradation of sedimented organic matter. This characteristic, combined with the largely intact vegetation places Yaguas National Park as a critical site in mitigating climate change or as classified by CI one of the world’s irrecoverable carbon sites. The inland water ways within and adjacent to the park also provide an important source of protein for neighboring communities.

One of the key challenges of the park is its accessibility. Access is largely limited to riverine corridors. Communities are located along these corridors but not within the Park itself. As a result limited biodiversity monitoring has been undertaken to date.



**Figure 1:** Map showing the location of Yaguas National Park

## 2. Project Overview

CI is requesting proposals from suitably qualified consultants to develop a monitoring plan in readiness for potential nature / biodiversity crediting. The intent of the monitoring plan is to collect data in a way that enables optionality across a range of biodiversity crediting standards noting the fluidity of crediting standards and methodologies currently. Given the accessibility challenges of Yaguas, the plan must consider the practicality of any proposed monitoring regime that is both feasible and not cost prohibitive. In addition, any monitoring regime should seek to utilize Traditional Knowledge to the extent possible, provide opportunities for community participation in monitoring regimes and utilize technology as a means to increase accuracy over time while reducing costs.

## 3. Deliverables and Deliverables Schedule

<b>Deliverable</b>	<b>Activities</b>	<b>Acceptance criteria and proposed timeline</b>
1. Kick off meeting	Project kick off meeting to confirm project approach, timeline and ways of work and who from CI should be engaged and when.	Project kick off meeting upon execution of contract (Assume week commencing 24 June 2024)  Project plan
2. Review of existing biodiversity and biophysical monitoring	Through literature review and interviews, review all existing biodiversity and biophysical monitoring studies (note CI Peru have a compilation of most of these already) and their relevance for potential crediting purposes (noting the relevance assessment will likely need to follow after the steps below are complete).	Brief report compiling a list and location of existing monitoring that have been undertaken and relevance or otherwise to crediting processes
3. Analyze most applicable crediting standards	Analyze existing nature / biodiversity crediting methodologies and standards and determine their possible fit for Yaguas and any implications for monitoring plan design:  1. Systematically extract and evaluate key features/attributes of the crediting methodologies and standards consistent with the criteria below and present them in a draft evaluation table. The review should in the first instance be general and include specific	Consensus with CI on outcomes of evaluation and recommendations for Yaguas no later than 31 July 2024 (noting draft will need to be shared in advance of this)

	<p>recommendations as to the preferred standards and methodologies to be considered for design of Yaguas's monitoring plan should be included.</p> <p>2. In a meeting with CI discuss the outcomes of the evaluation and draft recommendations to reach consensus on which standards and methodologies to apply to monitoring plan design.</p> <p>The following criteria should be utilized for the analysis:</p> <ul style="list-style-type: none"> <li>- Availability of stewardship/maintenance credits methods</li> <li>- Global applicability potential</li> <li>- Realm applicability i.e. terrestrial / freshwater / marine etc.</li> <li>- Credit unit of the framework (e.g. quality hectares)</li> <li>- Specificity regarding metrics and indicators</li> <li>- Requirement of what to measure/monitor (e.g. are taxonomic indicators required? Are in situ and remote sensing indicators included?)</li> <li>- Prescriptiveness/rigor in methodological sampling design (e.g. is there statistical power analysis? What is the spatial sampling design and minimum number of in situ sites?)</li> <li>- Requirements for additionality</li> <li>- Approach to baseline or reference condition</li> <li>- Quantification of biodiversity gains/uplift / maintenance, including approach to baseline, reference sites or counterfactual scenario</li> <li>- Consideration of dynamic or shifting baselines (i.e. disturbance prone systems; effects of climate change)</li> </ul>	
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	<ul style="list-style-type: none"> <li>- Definition of credit and project duration/timescale</li> <li>- Revalidation cycle</li> <li>- Integration of Traditional Knowledge</li> <li>- Ability for data to cascade up into National Biodiversity measures</li> <li>- Relative complexity of requirements</li> <li>- Level and type of safeguard protections (e.g. IPLC; benefit sharing)</li> </ul>	
4. Develop a report of what needs to be monitored	<p>Develop a report that addresses what needs to be monitored in consideration of:</p> <ul style="list-style-type: none"> <li>a. Requirements aligned to preferred standards and methodologies identified in 4</li> <li>b. Traditional Knowledge</li> </ul> <p>Share a draft of the monitoring plan for CI review and schedule a meeting to discuss feedback. Finalize the plan based on feedback from the draft</p>	<p>Draft Biodiversity Monitoring report for CI review</p> <p>Meeting scheduled to discuss Feedback</p> <p>Biodiversity monitoring report finalized (by 30 August 2024)</p>
5. Develop options of how the monitoring plan may be implemented	<p>Present options including cost estimates of how the ongoing monitoring requirements could be met in consideration of:</p> <ul style="list-style-type: none"> <li>a. Community engagement and Traditional Knowledge</li> <li>b. Technology options available to meet monitoring plan requirements. Technology assessed should include in-situ and remote options and the opportunities (e.g. participatory monitoring) and challenges (e.g. data processing implications, data storage, weather resilience etc.) Traditional field work</li> </ul> <p>Schedule a meeting to discuss recommendations to enable selection of preferred options</p>	<p>Draft monitoring method and cost options for CI review (ahead of meeting)</p> <p>Meeting to discuss recommendations on monitoring implementation options and costs to identify preferred options (by 27 September 2024)</p>

6. Finalize biodiversity monitoring plan	Finalize a monitoring plan which combines the outcomes of deliverables 5 and 6 to provide a holistic monitoring plan which addresses what needs to be monitored, how this will be done and relative frequencies	Draft biodiversity monitoring plan for CI review (11 October 2024)  Finalized biodiversity monitoring plan (Due 25 October 2024)
7. Develop a project plan to guide next steps for implementation	Based on the finalized monitoring plan develop a project plan and scope of work including key activities and sequencing to guide the next steps toward monitoring plan implementation.	Draft project plan for CI review (15 October 2024)  Finalized project plan ( 22 November 2024)

#### 4. Submission Details

- a. Deadline. Proposals must be received no later than **7th June 2024 US EST**. Late submissions will not be accepted. Proposals must be submitted via email to [ciprocurement@conservation.org](mailto: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](mailto: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

- Deep expertise in biodiversity monitoring and monitoring plan design
- Deep expertise in biodiversity data analysis
- Expertise in:
  - Tropical forest ecology
  - Freshwater ecology
  - In-situ and remote biodiversity monitoring technologies and approaches
- Knowledge of nature / biodiversity crediting standards and methodologies
- Excellent communication and report writing skills
- Ability to work independently / proactively
- Collaboration skills

#### 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 Section 3 (Deliverables and Deliverable Schedule)
- d. Financial Proposal. Offerors shall use the cost proposal template (Attachment 2).

## 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:

Criteria	Weighting (%)
<ul style="list-style-type: none"> <li>• The bidder and the proposed personnel have the specific technical expertise and proven experience including:               <ul style="list-style-type: none"> <li>○ Deep expertise in biodiversity monitoring and monitoring plan design</li> <li>○ Deep expertise in biodiversity data analysis</li> </ul> </li> </ul>	<b>30</b>
<ul style="list-style-type: none"> <li>• The bidder and the proposed personnel have the specific technical expertise and proven experience including:               <ul style="list-style-type: none"> <li>○ Tropical forest ecology</li> <li>○ Freshwater ecology</li> <li>○ In-situ and remote biodiversity monitoring technologies and approaches</li> </ul> </li> </ul>	<b>30</b>
<ul style="list-style-type: none"> <li>• Technical approach proposed: the sequence and approach of proposed activities reflects a sound understanding of the work required</li> </ul>	<b>20</b>
<ul style="list-style-type: none"> <li>• Financials (Rates and lump sum): Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment.</li> </ul>	<b>20</b>

## 8. Proposal Timeline

RFP Issued	13 May 2024
Clarifications submitted to CI	21 May 2024
Clarifications provided to known bidders	25 May 2024
Complete proposals due to CI	7 June 2024
Final selection	14 June 2024

- 9. Resulting Award** CI anticipates entering into an agreement with the selected bidder by **21 June 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](http://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**

RFP No. **FY24-015**

UEI Number (if applicable):N/A

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

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

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

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

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

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

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

- a. We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror's business
- b. We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.
- c. We are/were not involved in writing or recommending the terms of reference for this solicitation document.



- d. We have not engaged in any collusion or price fixing with other offerors.
- e. We have not made promises, offers, or grants, directly or indirectly to any CI employees involved in this procurement, or to any government official in relation to the contract to be performed, with the intention of unduly influencing a decision or receiving an improper advantage.
- f. We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.
- g. We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.
- h. We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).
- i. We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension".

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 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

<b>Deliverable</b>	<b>Price (Lump Sum, All Inclusive)</b>
1. Kick off meeting	
2. Review of existing biodiversity and biophysical monitoring	
3. Analyze most applicable crediting standards	
4. Develop a report of what needs to be monitored	
5. Develop options of how the monitoring plan may be implemented	
6. Finalize biodiversity monitoring plan	
7. Develop a project plan to guide next steps for implementation	