

Request for Proposals

Title: *Clarifying Principles, Definitions, and Standards for Insetting*

RFP No: 01172024

Date of Issuance: 17 January 2024

1. Background

Conservation International (CI) is a global non-profit organization dedicated to protecting nature for the benefit of all. Founded in 1987, CI works in over 30 countries on six continents, harnessing a combination of science, policy, and partnerships to address the most critical threats to the natural world. The organization's mission is to empower societies to responsibly and sustainably care for nature, our global biodiversity, and the well-being of humanity. CI's approach is grounded in science and partnership, with a strong emphasis on working collaboratively with local communities, governments, the private sector, and other NGOs.

The push from regulation & voluntary standards for companies to address the climate and nature impacts within their supply chains has potential to boost funding for programs that protect, restore, and sustainably manage ecosystems while benefiting both people and biodiversity. However, increasing scrutiny on corporate action and lack of clear definitions, principles, and standards for this action has limited investment to date. We hope to scale high-quality investments within corporate value chains by supporting industry alignment on “what good looks like” and demonstration of high-integrity value chain investments through our own programs.

Insetting is a way for companies to reduce their Potential emissions while delivering a range of other positive outcomes for nature and people by investing in natural climate solutions within their own supply chain. This project is focused specifically on reductions and removals in Forestry Land-use, and Agriculture (FLAG)-related emissions, although “insetting” is also used by others to refer to other energy- and industry-related GHG reduction approaches¹. Insetting can improve the sustainability and resilience of companies’ operations, supply chains, and products, while also enhancing the livelihoods of farmers and local communities and contributing to climate change mitigation and adaptation.

Insetting offers many opportunities for companies to make progress on their scope 3 emissions reduction targets, collaborate with supply chain partners, contribute to the global goals of the Paris Agreement and the UN SDGs, support the just transition, and improve the resilience of their supply chains. It also offers the potential opportunity for communities and producers to be directly rewarded for improving the environmental performance and resilience of their operations

¹ “Insetting” is a diversely defined term that includes both actions that are countable within corporate scope 1, 2, & 3 greenhouse gas (GHG) footprints (i.e., *within value chain mitigation*) and actions that occur near corporate supply chains but are not countable towards a company’s GHG footprint (i.e., *beyond value chain mitigation, BVCM*). The line between these types remains unclear in some supply chains but GHG Protocol’s Land Sector and Removals guidance is expected to offer additional clarity when it is finalized in 2024. The term is meant to be a contrasting approach to “offsetting”, when companies invest in projects unrelated to their supply chains. Some stakeholders (especially those focused on *within value chain mitigation*) avoid using the term given its ambiguity, but the choice was made to use it for this work because the scope of this work will include natural climate solutions that are both on and near farms which may eventually be classified as within or beyond value chain mitigation.

while strengthening relationships with their buyers.

2. Project Overview

While investment in inseting is expected to grow significantly in coming years², several challenges have prevented inseting action from scaling to date. As highlighted in [recent supply-side-focused work](#) by Abatable and the International Platform for Insetting (IPI) and [demand-side-focused work](#) underway at WBCSD, these include the lack of a clear definition, standard, and guidance for the practice, the difficulty of setting and verifying geographical boundaries and emissions claims, uncertainty around who can claim what when multiple buyers source from the same farms on same or different crop rotations, the uncertainty of costs and benefits, and potential policy and regulatory risks. Lack of clear principles for what constitutes high integrity in the context of inseting could also lead to inseting strategies that prioritize carbon outcomes without consideration of potential consequences for ecosystems and the communities within supply chains.

For example, without clearly established principles around partnership and benefit sharing with producers, inseting could be used to put yet additional pressure on already stressed producers to take on the burden of implementing new practices without proper compensation.

This work is intended to address some of the key blockers to scaling high-quality inseting action by demonstrating how inseting and related action meets the requirements of global frameworks and identifying gaps in those frameworks (Task 2), assessing the verification pathways available for inseting projects (Task 3), and establishing clear principles, safeguards, and definitions for high integrity inseting (Task 4).

The budget available for this scope of work is \$50,000-100,000.

3. Terms of Reference, Deliverables and Deliverables Schedule

Deliverables and deliverable schedule outlined in detail in Attachment 2

4. Submission Details

- a. **Deadline.** Proposals must be received no later than **13 February 2024 by 5 pm EST**. Late submissions will not be accepted. Proposals must be submitted via email to

² Three major recent changes are driving increasing corporate investment in inseting. First, [35+ governments](#) are planning to mandate climate disclosure which is shifting corporate GHG management from corporate social responsibility to a regulatory compliance activity. Second, the leading GHG accounting (GHG Protocol) and target-setting framework (SBTi) now require companies to set dedicated GHG targets for their land emissions (FLAG targets) and has clarified that on-farm removals count towards these targets. Third, the perceived risk of greenwashing associated with offsetting has led some FLAG companies to prioritize investments within rather than beyond their value chain.

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

Note: Bidders may choose to partner with other firms to fulfill all of the requirements listed below, but CI will award only a single contract to the primary consultant as per section 9 of the RFP. If a consortium proposal is submitted, please indicate the primary contractor.

- a. *Expertise in Climate Change and Sustainability:* The Consultant(s) should have a demonstrated track record in climate change, environmental sustainability, and related fields. This includes experience in developing sustainability frameworks, understanding GHG accounting, and experience with inseting projects, value chain interventions, and/or carbon offset projects in the land sector across global south and global north contexts.
- b. *Experience with Stakeholder Engagement:* Given the emphasis on convening and working with diverse stakeholders, the Consultant(s) should have proven experience in stakeholder identification, engagement, and management. This includes experience in conducting interviews, surveys, and facilitating workshops with a diverse range of participants (such as companies, NGOs, government bodies, indigenous groups, etc.) and finding consensus.
- c. *Knowledge of International Climate and Nature Strategy Frameworks:* The Consultant(s) should have in-depth knowledge of key corporate climate and nature strategy frameworks (like GHGP, SBTi, SBTN, TCFD, & TNFD), reporting frameworks (like CDP, CSDR), national climate and nature frameworks (like Article 6, NDCs, NBSAPs, Global Biodiversity Framework), and voluntary & compliance carbon market requirements. Understanding the intricacies of these frameworks and their interaction with corporate and national objectives is crucial.
- d. *Analytical and Research Skills:* The Consultant(s) should possess strong analytical skills, especially in analyzing complex environmental data and frameworks. They should also have a solid background in research to assess various frameworks, inseting principles, and verification pathways.
- e. *Experience in Report Writing and Public Communication:* The Consultant(s) should have experience in preparing detailed, clear, and concise reports for various audiences,

including corporate leaders, policy makers, and sustainability professionals. The ability to translate complex concepts into understandable language is key.

- f. *Cross-Cultural and International Experience:* Given the global nature of the stakeholders (from both the global south and north), the Consultant(s) should have experience working in diverse cultural contexts and an understanding of the nuances in international sustainability initiatives.
- g. *Expertise in Verification Standards and Pathways:* For Task 3, knowledge of various verification standards and pathways (like Verra, Gold Standard, Plan Vivo, etc.) is essential. The Consultant(s) should be able to critically assess these standards and provide recommendations.
- h. *Flexibility and Adaptability:* The Consultant(s) should demonstrate an ability to work in a dynamic environment, adapting to evolving project needs and stakeholder inputs.
- i. Ability to conduct interviews in Spanish, French, Portuguese, and/or Indonesian is a plus.

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. 10-page limit excluding CVs and past work samples (if applicable).
 - i. Consultant(s) 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 Work Plan. The Technical Proposal should describe in detail how the bidder intends to carry out the requirements described in the Terms of Reference ([Attachment 2](#)).
- 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:

| Evaluation Criteria | Score (out of 100) |
|---|--------------------|
| Is the proposed approach and methodology clear and appropriate to the assignment and the planning logical, realistic and promise efficient implementation to the project? | 25% |
| 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% |

| | |
|---|-----|
| Does the bidder and the proposed personnel have the specific stakeholder engagement expertise for the assignment? | 15% |
| Cost: Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment. | 20% |

8. Proposal Timeline

| | |
|---|------------------|
| RFP Issued | 17 January 2024 |
| Clarifications submitted to CI | 24 January 2024 |
| Clarifications provided to known bidders | 31 January 2024 |
| Complete proposals due to CI | 13 February 2024 |
| Shortlisted bidders invited for interview | 23 February 2024 |
| Final selection | 05 March 2024 |
| Project kickoff | 18 March 2024 |

- 9. Resulting Award** CI anticipates entering into an agreement with the selected bidder by **18 March 2024**. Any resulting agreement will be subject to the terms and conditions of CI's Services Agreement. A model form of agreement is provided as Attachment 4. The selected bidder will be required to enter into a non-disclosure agreement with CI prior to initiating services.

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: Terms of Reference

Attachment 3: Cost Proposal Template

Attachment 4: CI Services Agreement Template

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

RFP No. **01172024**

UEI 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". [\[Include additional sanctions lists of the country of a public donor, if required by the donor.\]](#)

Name: _____

Signature: _____

Title: _____

Date: _____

Attachment 2: Terms of Reference

Below is a summary of the key tasks, expected deliverables, and timeline envisioned to be undertaken by the bidder. While we believe the following approach can be effective, CI is open to alternative approaches that the bidder believes may be more effective to achieving the outcomes desired.

Task 0. Project kickoff

Objective: Agree on workplan, timeline, and key conventions for work (incl. communication plan, process for handling amendments to scope, etc.).

Key Task: Kickoff meeting.

Deliverable: Detailed workplan.

Task 1. Stakeholder identification and engagement

Objective: Identify key stakeholders and begin engagement as early as possible to increase value and likelihood of engagement.

Key Activities: [Note: this task would be conducted in parallel with Tasks 2-4]

1. Identify key stakeholders to be engaged and to request input from on the topics covered in the following Tasks. All stakeholders do not need to be engaged for all tasks. Target involvement from a representative group of 30-40 stakeholders including (indicative, not exhaustive):
 - a. Companies with significant land sector footprints
 - b. Project developers and consultants active on insetting
 - c. Producer representatives from both the global south and north
 - d. Indigenous Peoples & Local Communities (IPLC) representatives
 - e. Government representatives from both global south and north
 - f. Industry collaborations, e.g. We Mean Business, World Business Council for Sustainable Development (WBCSD), International Platform for Insetting (IPI), Value Change Initiative (VCI), Sustainable Coffee Challenge, Global Coffee Platform, World Cocoa Foundation, 3keel, SAI Platform, and others
 - g. Relevant NGOs, e.g. IDH, WWF, TNC, RA, WCS, WRI, ESMC, Soil Capital, and others
 - h. Certification schemes and standard owners, e.g., Verra, Gold Standard, Plan Vivo, FSC, RSPO and others
2. Work with CI to define roles and confirm the nature of engagement to be offered to key stakeholders (endorsement, collaboration, cited participation, anonymous participation etc.)
3. Conduct initial engagement of stakeholders to share project objectives, confirm participation, and confirm any key missing stakeholders.

4. Solicit input from stakeholders via individual interviews, written feedback, survey, and 2-to-4 virtual workshops to support Tasks 2-4.

Deliverables:

- A. Initial stakeholder list and engagement plan
- B. Interview details including names, titles, contact information, dates of interaction and any follow up actions identified in interviews. This will be for CI's record only -- interviewees will be able to elect whether or not they will be named publicly.
- C. (Delivery of stakeholder engagement via individual interviews, written feedback, survey, and 2-to-4 virtual workshops to support Tasks 2-4.)

Task 2. Standards Framework Mapping

Objective: Create a clear view of how action within and around company value chains contributes to the constellation of frameworks that companies are currently navigating and countries are establishing (e.g., SBTi, SBTN, TCFD, TNFD, VCMI, NDCs, NBSAPs, etc.) to clarify how inseting and landscape action can simultaneously contribute to both corporate and national climate and nature objectives while addressing potential double counting/claiming. Identify any key gaps in existing frameworks.

Key Activities:

1. Identify the key climate and nature strategy frameworks to include in the analysis. This will include (not exhaustive):
 - a. Leading corporate climate and nature strategy frameworks like GHGP, SBTi, VCMI, SBTN, TNFD, and TCFD.
 - b. Key reporting frameworks like CDP, EU CSDR, California reporting requirements
 - c. Leading nature and climate policy frameworks e.g., NDCs, NBSAPs.
 - d. Voluntary & compliance carbon market requirements e.g., SBTi BVCM guidance, VCMI, and IC-VCMI.
2. Engage key standards organizations and leverage interviews from Task 1 to:
 - a. Validate key frameworks identified and confirm the roles each framework plays in motivating action (practices-based reporting, target-setting guidance, outcomes-based reporting etc.) and identify any gaps that need to be filled to transform assessment, reporting, and target-setting into action.
 - b. Characterize the types of action companies can take and show where inseting can(not) contribute to meeting the requirements of key frameworks and where it could but is limited by existing rules. Address the interaction between corporate & national, climate & nature frameworks (e.g., whether an action can generate both scope 3 reductions and be countable towards NDCs). This output should leverage the definitions established in Task 1 and agreed in industry. E.g., BVCM vs in value chain mitigation, etc.

3. Develop report after up to two rounds of feedback and input from standards organizations where needed to validate recommendations.

Deliverables:

- A. 10-to-15-page public facing report (ideally validated/endorsed by key standards orgs) with simplified graphic showing which actions can address the needs highlighted in the key frameworks, where/how action overlaps multiple frameworks, any remaining gaps in frameworks or opportunities for consolidation. Target audience is corporate leaders, advocacy organizations, and national/international policy makers.
- B. Summary of industry interviews and additional detail not captured in #1.

Task 3. MRV Pathway Assessment

Objectives: Map the existing accounting and verification approaches available to companies for insetting to identify the suitability, scalability, and pros/cons of each, clarify any key gaps in the existing options, examine if there are emerging risks that the current system is not adequately addressing, and recommend how companies can act despite uncertainty. Characterize the possible levels of verification companies pursue and propose framework for deciding whether verification is required.

Key Activities:

1. Identify the key verification standards and pathways to include in the analysis as well as initial detail on the non-verified approaches companies currently take (e.g., 2nd party verification). Standards considered will include (not exhaustive):
 - a. Value Change Initiative / Gold Standard
 - b. Verra Scope 3 program
 - c. Plan Vivo
 - d. Rabobank Acorn
2. Develop report characterizing different verification (and non-verification) pathways including the key functions, scalability, alignment with SBTi FLAG guidance & GHG Protocol Land Sector & Removals guidance, strengths, weaknesses, and best sectoral and/or geographic fit of each. Provide recommendations for how insetting verification system could be improved to ensure key climate and nature outcomes. Where relevant, pull from learnings from scope 2 market-based mechanisms. Drafting should include up to two rounds of feedback.

Deliverables:

- A. 10-to-15-page public-facing report summarizing findings. Target audience is corporate sustainability professionals, producers & their representatives, and project developers.
- B. Summary of industry interviews, technical details, and additional detail not captured in #1.

Task 4. Develop Insetting Principles and Definitions

Objective: Convene key stakeholders to agree upon and endorse a set of clear operating principles and working definitions for different types of insetting to lay a foundation for high-integrity action while waiting for the GHG and nature accounting rules solidify³. The goal of this effort is not to create a new standard but rather to agree on best practices and principles to drive action despite uncertainty, inform alignment of current frameworks and initiatives, and to fill gaps in existing standards frameworks.

1. Develop first draft of principles with inputs from CI and existing sources.
2. Leverage interviews in Task 1 to assess value of drafted principles with these stakeholders and collect feedback on them.
3. Refine principles language through up to two rounds of revision to secure endorsement from a range of stakeholders.

Deliverables:

- A. Summary of conclusions from stakeholder consultations, gaps identified that are preventing investment/action, how principles address these gaps, and what gaps remain.
- B. Set of 5-to-8 insetting principles summarized in a 3-to-5-page document. The intended audience of this work is corporate sustainability professionals, standards setters, policymakers, and accountability advocates.
- C. 3-to-5-page summary of recommended approach for companies to act despite GHG and nature accounting gaps, including references to useful examples from interviews and clarification of the risks and opportunities of early action and 2-to-4 case studies demonstrating effective application of the principles.

Indicative Timeline

The goal is to complete the work within 10-12 weeks of initiation and to complete the tasks in parallel.

Indicative schedule:

| | |
|---|--------------|
| Task 0: Kickoff and finalize workplan | Week 1 |
| Task 1: Identify and engage key stakeholders | (throughout) |
| Develop Task 2 deliverables with rounds of feedback | Weeks 2-8 |
| Develop Task 3 deliverables with rounds of feedback | Weeks 2-8 |
| Develop Task 3 deliverables with rounds of feedback | Weeks 6-10 |

Location of Task/Applicable Trips

Tasks will be completed remotely unless adequate justification is made for travel.

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 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 (indicative example)

| Deliverable | Price (Lump Sum, All Inclusive) |
|---|--|
| Task 0 deliverables (project kickoff) | |
| Task 1 deliverables & activities (stakeholder engagement) | |
| Task 2 deliverables (standards framework mapping) | |
| Task 3 deliverables (MRV pathway assessment) | |
| Task 4 deliverables (develop inseting principles and definitions) | |
| TOTAL | |

Cost Breakdown by Cost Component (indicative example)

| Description | Unit (e.g., days) | Unit Cost (e.g., USD/day) | Total Cost | Comments |
|------------------------------|--------------------------|----------------------------------|-------------------|-----------------|
| Task 0 | | | | |
| Consultant 1 | | | | |
| Consultant 2 | | | | |
| Task 1 | | | | |
| Consultant 1 | | | | |
| Consultant 2 | | | | |
| Task 2 | | | | |
| Consultant 1 | | | | |
| Consultant 2 | | | | |
| Task 3 | | | | |
| Consultant 1 | | | | |
| Consultant 2 | | | | |
| Task 4 | | | | |
| Consultant 1 | | | | |
| Consultant 2 | | | | |
| Sub-total Personnel | | | | |
| | | | | |
| Travel Costs (if applicable) | | | | |
| | | | | |

| | | | | |
|---|--|--|--|--|
| Other related Costs (please specify) | | | | |
| | | | | |
| Total Cost of Financial Proposal | | | | |

Attachment 4: CI Services Agreement Template

SERVICE AGREEMENT BETWEEN CONSERVATION INTERNATIONAL FOUNDATION



AND
[ENTER SERVICE PROVIDER NAME]

Service Agreement Number: **[ENTER BUSINESS WORLD CMF NUMBER]**

Project Title: **[ENTER PROJECT TITLE]**

This Services Agreement (the 'Agreement') is made and entered into by and between Conservation International Foundation ('CI'), a nonprofit public benefit corporation organized under the laws of the State of California and **[NAME]**, a **[type legal entity e.g., sole proprietor, partnership, corporation etc.]** ('Service Provider'). The Agreement comes into effect on the Agreement Start Date, (the 'Effective Date').

1. Services; Project Description. CI hereby engages Service Provider as an independent contractor, on a non-exclusive basis, to perform the activities and provide the deliverables set forth below and in Appendix 1 (the 'Services'), as may be modified from time to time:

[INCLUDE OVERALL DESCRIPTION OF PROJECT, SPECIFY EXPECTED OUTCOMES. DELIVERABLES WILL BE DETAILED IN APPENDIX 1.]

During the Agreement Term (as defined in Section 2) of this Agreement, CI shall have the right to request reasonable changes to the scope of the Services. All changes shall be in writing and signed by authorized representatives of the parties. Service Provider shall receive technical direction from **[CI REPRESENTATIVE'S NAME AND TITLE]** or his/her designee, as authorized in writing.

2. Term. The Agreement Start Date is **[DATE]**. The Agreement End Date is **[DATE]** unless otherwise modified, or the Agreement is terminated in accordance with Section 6. Any extension of the Term requires a written amendment of this Agreement signed by authorized representatives of both Parties.
3. Fee for Services. In consideration of Service Provider's performance of the Services during the Term, CI shall pay Service Provider the Fee for Services as provided below:
 - a. Fixed Price Contract. A Fee for Services not to exceed \$ **[]** which is based on payment against deliverables as described in Section 4 and outlined in the deliverables schedule attached as Appendix 1.
 - i. Expenses: **[CHOOSE (A) OR (B) AND DELETE THE OPTION THAT IS NOT SELECTED]**

The Fee for Services set forth above:

(A) is inclusive of all expenses.

(B) excludes reimbursables (out of pocket) expenses. Reimbursable expenses up to \$ **[]** may be incurred with prior approval from CI. The budget for these anticipated expenses is included in Appendix 2. Expenses must be reasonable and

documented as specified in the Payment Terms. Total expenses shall not exceed those set forth in the attached budget without prior written approval of CI.

- a. All activities and expenditures must occur during the Term to be reimbursable.

1. Payment Terms.

- a. Payment shall be made on receipt and acceptance of the deliverables in accordance following schedule:

- (1) \$ ____ upon completion and CI's acceptance of deliverable No. 1,
- (2) \$ ____ upon completion and CI's acceptance deliverable No. 2,
- (3) \$ ____ upon completion and CI's acceptance of final deliverable.

Service Provider shall provide invoices to CI containing name and address and deliverables (as defined in Appendix 1) completed and accepted, and payment instructions.

- b. **[DELETE IF FEE IS INCLUSIVE OF EXPENSES]** Invoices for reimbursable expenses shall be accompanied by an itemized account of such expenses, together with original receipts *(or copies, with originals to be retained by the Consultant for a period of five (5) years for CI's audit purposes) * for expenses over \$40.00. All amounts will be paid within thirty (30) days after receipt and approval of the Consultant's invoice.

- c. Service Provider shall provide an IRS W-9 form for US entities, or an IRS W-8 form for non-US entities.

2. Acceptance of Deliverables; Time is of the Essence.

- c. Acceptance Criteria. Service Provider is expected to perform the Services and Deliverables in accordance with the acceptance criteria defined in Appendix 1, which may be revised and supplemented from time to time during the Term to accommodate successful performance of the Services ("Acceptance Criteria").

- b. Acceptance. In the event that a Deliverable meets CI's Acceptance Criteria, CI shall notify the Service Provider that such Deliverable has been accepted. In the event that a Deliverable does not meet CI's Acceptance Criteria, CI shall advise the Service Provider as to which aspects of the Deliverable require revision. Service Provider shall implement such revisions in accordance with CI's instructions and deliver the revised Deliverable to CI for review within **[INCLUDE APPROPRIATE AMOUNT OF BUSINESS DAYS]** business days following receipt by Service Provider of the revision request. CI may request that this process be repeated as many times as necessary to meet the acceptance criteria. Time spent on necessary revisions to meet Acceptance Criteria may not

be charged to CI, unless authorized in writing by CI. CI reserves the right to terminate this Agreement, in accordance with section 6 below, in the event that the Service Provider is unable to meet the Acceptance Criteria within the time period provided by CI or a reasonable period following notice that the deliverable has not met CI's Acceptance Criteria or if CI determines the deliverable is incapable of revision that will result in its acceptance of the deliverable.

- c. Time is of the Essence. Service Provider shall perform the Services in strict compliance with the Delivery Schedule set forth in Appendix 1. Time is of the essence with respect to all aspects of this Agreement and the subject matter hereof.
2. Termination. Either party may terminate this Agreement at any time upon ten (10) days prior written notice. In such event, Service Provider shall provide to CI all deliverables (including all embodiments thereof) completed or partially completed up to the effective date of termination to CI in a format and medium specified by CI, and CI shall pay a pro-rated fee for all Services provided by the Service Provider in good faith prior to the effective date of termination. Any payment effected by CI in excess of the pro-rated fee due on the effective date of termination shall be returned by the Service Provider immediately upon request by CI. If CI terminates this Agreement due to a material breach by Service Provider or due to the Service Provider's failure to perform any of the Services to CI's satisfaction, CI may withhold payment for any such unsatisfactory Services until such Services are performed to CI's satisfaction.
3. Indemnification. Service Provider hereby covenants and agrees to indemnify CI and to defend and hold CI harmless from and against any and all liabilities, damages, costs and expenses (including reasonable attorney's fees) arising out of or resulting from any claim, action or other proceeding (including any proceeding by any of Service Provider's employees, agents or contractors) related to or arising out of the performance of the Services under this Agreement.
4. Relationship of CI and Service Provider. **[CHOOSE OPTION 1 OR 2 DEPENDING ON WHETHER SERVICE PROVIDER IS A COMPANY OR AN INDIVIDUAL – DELETE THE PARAGRAPH WHICH DOES NOT APPLY]**
[OPTION 1 - IF A COMPANY] Service Provider is not an employee, agent or assign of CI for any purposes whatsoever. Accordingly, Service Provider shall be solely responsible for all matters relating to the employment of its personnel including, but not limited to, compliance with all applicable workers' compensation, unemployment compensation and social security laws and with all withholding and all other federal, state and local laws and regulations governing such matters. CI shall not provide Service Provider or its employees with any insurance or other benefits including, but not limited to, unemployment, medical, dental, worker's compensation and/or disability insurance.

[OPTION 2 - IF AN INDIVIDUAL] Service Provider is performing the Services as an independent contractor of CI and not as an officer, employee, partner, agent or assign of CI for any purposes whatsoever including, but

not limited to, federal, state, or local taxes, payroll tax or workers' compensation coverage. Accordingly, Service Provider has no right or authority to assume or create any obligation of any kind or to make any representation or warranty, whether expressed or implied, on behalf of CI or to bind CI in any respect. In addition, CI shall not withhold or pay federal, state or local income tax, or payroll tax of any kind on behalf of Service Provider, nor shall CI provide Service Provider with any insurance or other benefits including, but not limited to, unemployment, medical, dental, worker's compensation and/or disability insurance. **Service Provider understands that he/she is responsible to pay, according to law, his/her income and all other applicable taxes.**

9. Government Officials and Employees.

- a. Service Provider hereby certifies that no assistance, payments or anything of value (monetary or non-monetary) shall be made, promised, offered to or accepted by any government employee or official
 - i. in contravention of any U.S. or other applicable law or regulation including, but not limited to, the U.S. Foreign Corrupt Practices Act;
 - ii. without the express consent of the government for which the employee or official works; and
 - iii. that is not reasonable, *bona fide*, and directly related to the activities funded under this Agreement. It is Service Provider's responsibility to ensure compliance with this clause, and to maintain and provide at CI's request, documentation demonstrating such compliance.
- b. Service Provider hereby certifies that no payments or other form of assistance shall be made to or accepted by any government employee or official
 - i. to influence any official government act or decision;
 - ii. to induce any government employee or official to do or omit to do any act in violation of his or her lawful duty; or
 - iii. to obtain or retain business for, or direct business to any individual or entity.
- c. **[DELETE IF SERVICE PROVIDER IS NOT A GOVERNMENT EMPLOYEE OR OFFICIAL]** If Service Provider is a government employee or official, Service Provider shall:
 - i. Remove him/herself from any governmental act or decision that may affect CI and shall not influence any governmental act or decision that may affect CI. Under no circumstances shall any payments or anything of value be given, made, promised or offered to any U.S. Federal, State or local employee or official or any government employee or official in another jurisdiction.
 - ii. Make a representation as evidenced in **Appendix 4** that entering into this Agreement does not breach any of its existing contractual obligations with the relevant government agency or with any third parties, or other rules or regulations applicable to Service Provider as a government employee/official. **Appendix 4** to this Agreement is a letter from the relevant government agency stating that it consents to CI engaging

Service Provider to provide the Services and receive the compensation for the Services stipulated under this Agreement.

10. Confidential Matters and Proprietary Information. During the course of this Agreement, either party may acquire confidential information or trade secrets of the other ("Confidential Information"). Each party agrees to keep all such Confidential Information in a secure place, and further agrees not to publish, communicate, divulge, use, or disclose, directly or indirectly, for his own benefit or for the benefit of another, either during or after performance of this Agreement, any of the Confidential Information, except as may be required by law or this Agreement. Upon termination or expiration of this Agreement, each party shall deliver all Confidential Information produced or acquired during the performance of this Agreement and all copies thereof to the other. This obligation of confidence shall not apply with respect to information that is (a) available to the receiving party from third parties on an unrestricted basis; (b) independently developed by the receiving party; or (c) disclosed by the other party to others on an unrestricted basis.

11. Intellectual Property

[CHOOSE BETWEEN THE FOLLOWING TWO OPTIONS – NOTE THAT THE FIRST OPTION IS RECOMMENDED. DELETE THE PARAGRAPHS WHICH DO NOT APPLY.]

[OPTION 1, PREFERRED - CI OWNERSHIP – NO LICENSE TO SERVICE PROVIDER] All work product created, prepared, procured, generated or produced by Service Provider under this Agreement and delivered to CI including, but not limited to, raw or processed data, articles, reports, drawings, computer data bases, and all other memoranda (collectively, "Works"), shall belong solely and exclusively to CI. All Works shall be deemed "works made for hire" within the meaning of U.S. copyright law, and CI shall be deemed the author of the Works. If for any reason, any Work is not deemed a "work made for hire," or all rights in and to any Work are deemed not to vest in CI, Service Provider hereby irrevocably assigns and transfers any rights it may retain in and to the Works to CI and waives all its rights, title and interest in and to the Works, including moral rights. Upon CI's request and at its expense, Service Provider agrees to cooperate with and assist CI in perfecting its rights in and to the Works, including executing appropriate documents.

CI shall have the sole right to copyright the Works. Service Provider hereby grants to CI a nonexclusive, irrevocable royalty-free license to reproduce, translate, publish, use and dispose of, and to authorize others to so do, all copyrighted or copyrightable material not first produced or prepared by Service Provider in the performance of this Agreement, but which is incorporated in the Works, provided that such license shall be only to the extent that the Service Provider now has, or prior to completion of the Agreement may acquire, the right to grant such license without becoming liable to pay compensation to others solely because of such grant. To the extent that the Works contain any material to which Service Provider does not have the right to grant such license, Service Provider will assume responsibility for obtaining all necessary rights for use, reproduction, translation, publication and disposition of that material by CI.

[OPTION 2, NOT RECOMMENDED - CI OWNERSHIP – LICENSE TO SERVICE PROVIDER TO USE] All work product created, prepared, procured, generated or produced by Service Provider under this Agreement and delivered to CI including, but not limited to, raw or processed data, articles, reports, drawings, computer data bases, and all other memoranda (collectively, "Works"), shall belong solely and exclusively to CI. CI hereby grants to Service Provider a nonexclusive, revocable, royalty-free license to reproduce, translate, publish and use, and to authorize others to so do, all copyrightable Works first produced or prepared under this

Agreement by Service Provider; provided, however, that Service Provider understands and agrees that this license does not include the right to first publication of any Works, which right shall belong solely to CI.

CI shall have the sole right to copyright such Works. Service Provider grants to CI a nonexclusive, irrevocable royalty-free license to reproduce, translate, publish, use and dispose of, and to authorize others to so do, all copyrighted or copyrightable material not first produced or prepared by Service Provider in the performance of this Agreement, but which is incorporated in the Works, provided that such license shall be only to the extent that the Service Provider now has, or prior to completion of the Agreement may acquire, the right to grant such license without becoming liable to pay compensation to others solely because of such grant. To the extent that the Works contain any material to which Service Provider does not have the right to grant such license, Service Provider will assume responsibility for obtaining all necessary rights for use, reproduction, translation, publication and disposition of that material by CI.

12. Security and Safety. Service Provider agrees that s/he has read, understands and shall comply with any applicable security guidance provided by CI, and acknowledges that s/he shall be solely responsible for Service Provider's own safety and physical property or equipment during the performance of this Agreement.
13. Travel. Service Provider shall be solely responsible for any travel arrangements, travel insurance, and all arrangements for visas, passports or immunizations. Service Provider shall adhere to all applicable international, national or local regulations and advisories governing travel, including safety, health and security measures in effect throughout the Term. Where applicable, any individual contractors employed or engaged by Service Provider, assigned with international travel under the terms of this Agreement or engaged in a high risk activity, agree to release and to waive any claim against CI as provided in Appendix 3, Release and Waiver.
14. Choice of Law; Arbitration. This Agreement shall be construed and enforced in accordance with the laws of the District of Columbia, USA, applicable to contracts fully executed and performed therein and without giving effect to its conflict of laws principles. Any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration before a single arbitrator in Washington, DC, under the rules of the American Arbitration Association in effect at the time of commencement of the arbitration, and the parties agree that judgment upon the award rendered by the arbitrator shall be final, binding and may be entered in any court having jurisdiction thereof.
15. Compliance with Law; CI Code of Ethics; Sexual Exploitation, Abuse and Harassment (SEAH).
 - a. Service Provider will perform the Services in compliance with (i) the U.S. Foreign Corrupt Practices Act and Office of Foreign Asset Control regulations, as well as (ii) all laws and regulations of the country in which the Services are performed (including, but not limited to, such relating to bribery, corruption, terrorism financing and equal employment opportunity, as well as all the generally accepted standards applicable to such work), as if such aforementioned laws and regulations directly reached the activities of the Service Provider. Further, Service Provider agrees to perform all Services and to conduct all activities

related thereto in accordance with CI's Code of Ethics, a copy of which is attached hereto as Appendix 2 and incorporated by reference.

- b. Service Provider shall not directly or indirectly condone, encourage, or tolerate participation, or engagement in any conduct substantially equivalent to Sexual Exploitation, Sexual Abuse, and Sexual Harassment (as defined in CI's Policy on Prevention of Sexual Exploitation, Sexual Abuse, and Sexual Harassment, available at <https://www.conservation.org/about/our-policies/prevention-of-sexual-exploitation-sexual-abuse-and-sexual-harassment>) in carrying out Services hereunder.

16. Service Provider's Anti-Terrorism Representation and Warranty. Service Provider is hereby notified that U.S. Executive Orders and U.S. law prohibit transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. Service Provider, therefore, represents and warrants that Service Provider has not provided, and will take all reasonable steps to ensure that Service Provider does 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 is compliant with all other applicable provisions of such U.S. Executive Orders and U.S. law.

16. Counterparts and Facsimile Signatures.

- a. Each party agrees that the other party may rely on a facsimile copy of the signature of a duly authorized signatory and that upon the exchange of such facsimile signatures, electronically or otherwise, this Agreement shall be binding between the parties whether or not hard copies of this Agreement are ever exchanged between them.
- b. This Agreement may be signed in one or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same instrument even though all the parties are not signatories to the original or the same counterpart.
 - a. Severability. In the event that any one or more of the provisions contained herein shall, for any reason, be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect any other provisions of this Agreement, but this Agreement shall be construed as if such invalid, illegal or unenforceable provisions had never been contained herein, unless the deletion of such provision or provisions would result in such a material change so as to cause completion of the transactions contemplated herein to be unreasonable.
 - b. No Third-Party Beneficiaries. Except as expressly set forth herein, neither party intends that this Agreement shall benefit or create any right or cause of action in or on behalf of any person or entity other than the Service Provider and CI.



19. Non-Assignment. This Agreement shall not be transferred or assigned by Service Provider without prior written consent of CI.

20. Waiver. Either party may specifically waive any rights under this Agreement by the other party, but no such waiver shall be deemed effective unless in writing, signed by the waiving party, and specifically designating the rights waived. No waiver shall constitute a continuing waiver of similar or other rights.
21. Entire Agreement; Amendments. This Agreement supersedes all prior oral or written agreements between the parties and constitutes the entire Agreement between the parties. Unless indicated otherwise herein, this Agreement may not be amended, supplemented, or modified in any respect except by written agreement signed by both parties.
22. Notices. Notice under this Agreement shall be deemed to have been sufficiently given either when served personally or when sent by first-class registered mail addressed to the parties at the addresses set forth below. CI shall not be liable for, nor shall Service Provider be liable to perform, services or expenses incurred after the receipt of notice or termination.

| | |
|---|---|
| If to Service Provider: Phone: Email: | If to CI: Attn: Conservation International Foundation 2011 Crystal Drive, Suite 600 Arlington, VA 22202 Phone: 703.341.2400 Email : |
|---|---|

The authorized representatives of the parties hereto have caused this Agreement to be executed as of the date first written above.

[SERVICE PROVIDER NAME]

Conservation International Foundation

[Contractor Name & Title]

[Name of CI representative]

[Title]
Attorney with signature delegation.]

[SVPs/+ or those designees holding a formal Power of

Date: _____

Date: _____

Appendix 1: Delivery Schedule

Appendix 2: Code of Ethics

Appendix 3: Release, Waiver of Liability and Consent to Medical Treatment

[If Applicable] Appendix 4: [GOVT AGENCY] No-Objection Letter

APPENDIX 1

DELIVERY SCHEDULE

| # | Deliverable | Activities | Acceptance Criteria [INCLUDE ACCEPTANCE CRITERIA AGAINST WHICH THE ACCEPTANCE PROCEDURE DESCRIBED IN SECTION 5 MAY BE CARRIED OUT; PLEASE BE SPECIFIC IN DEFINING THE ACCEPTANCE CRITERIA] | Due Date | Payment Amount USD |
|-----|-------------|------------|---|-------------|--------------------|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| ... | | | | | |

[DELETE IF REIMBURSABLE EXPENSE ARE NOT INCLUDED IN SECTION 3] REIMBURSABLE
EXPENSES BUDGET

| ITEM DESCRIPTION | UNIT COST | TOTAL COST/ITEM | PURPOSE |
|------------------|-----------|-----------------|---------|
| | | | |
| | | | |

| | | | |
|------------------------------------|--|--|--|
| | | | |
| | | | |
| TOTAL REIMBURSABLE EXPENSES BUDGET | | | |

[If Applicable, include from RFP] TERMS OF REFERENCE

APPENDIX 2

ETHICS STANDARDS

Conservation International's reputation derives from our commitment to our core 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 to which all parties must adhere.

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.

Integrity:

- Act in good faith, responsibly, with due care, competence and diligence and maintain the highest professional standards at all times.
- Comply with all contractual terms as well as all applicable laws, rules and regulations, domestic and international, in every country where Services are carried out.
- Provide true representation of all Services performed.
- Never engage in any of the following acts: falsification of business document or receipts, theft, embezzlement, diversion of funds, bribery, or fraud.

Transparency:

- Avoid conflicts of interest and not allow independent judgment to be compromised.
- Not accept gifts or favors from sub-contractors, suppliers or other 3rd parties that would negatively impact the provision of Services to CI.

Accountability:

- Disclose to CI, at the earliest opportunity, any information you have or become aware of, that may result in a real or perceived conflict of interest or impropriety.
- Implement activities, provide Services, and manage staff and operations in a professionally sound manner, with knowledge and wisdom with the goal of a successful outcome per the terms of this Agreement.

Confidentiality:

- Not disclose confidential or sensitive information obtained during the course of your work with CI.

- Protect confidential relationships between CI and other 3rd parties.

Mutual Respect and Collaboration:

- Engage with indigenous peoples and local communities in which CI works in a positive and constructive manner that respects the culture, laws, and practices of those communities, with due regard for the right of free, prior and informed consent.

I hereby acknowledge receipt of CI's Code of Ethics and certify agreement and compliance therewith.

FOR SERVICE PROVIDER:

By: _____

Title: _____

APPENDIX 3

RELEASE, WAIVER OF LIABILITY

I, [full name], have voluntarily agreed to participate in [program name, destination, trip dates], which may include international travel*, participation in training courses, workshops, field trips, day trips, field work, or any other activities associated with Conservation International Foundation's (CI) projects, activities, or programs (the "Program").

*For any international travel I hereby confirm that I am considered fully vaccinated against COVID-19 and other relevant vaccine-preventable diseases in accordance with CDC Travelers Health Recommendations.

1. I understand and acknowledge that I am not an agent or employee of CI, that I have no authority to bind CI, or make representations on CI's behalf. I voluntarily agree to enter into this Release, Waiver of Liability and Consent to Medical Treatment to govern the terms of my participation in the Program.
2. I understand and acknowledge and accept that my participation in the Program may involve risks and dangers that could result in damage to or loss of personal property, personal injury or loss of life. These risks include, but are not limited to, travel to, within and from rustic and/or remote areas, under rugged conditions, by plane, helicopter, truck, bus, passenger vehicle, boat and other modes of transportation; a

lack of adequate or immediately available medical care; forces of nature, unpredictable weather, dangerous wildlife; unstable political conditions and armed conflicts; unsanitary conditions; disease; scuba diving; tree climbing; and dangers that no amount of care, caution or experience can eliminate.

3. Having read and understood the terms of this Release and Waiver of Liability and in consideration of my participation in the Program I for myself, my spouse, family, heirs, executors, administrators, and legal representatives HEREBY UNCONDITIONALLY AND FULLY RELEASE, WAIVE AND FOREVER DISCHARGE Conservation International Foundation, its officers, directors, agents, affiliates, employees, and members (collectively, "Releasees"), from any and every claim, liability, suit, debt, controversy, or dispute (including attorneys' fees and costs), of whatever kind or nature, either in law or in equity, related to, resulting directly or indirectly from, or in any way connected with my participation in the Program [, whether due to the fault or negligence of Releasees, circumstances beyond Releasees' control, or otherwise. I understand and agree that Releasees have not expressly or impliedly assumed any duty or obligation toward me or associated with my participation in the Program.
4. I EXPRESSLY AND VOLUNTARILY ASSUME ALL RISK growing out of, incidental to, related to, resulting directly or indirectly from, or in any way connected with my participation in the Program whether due to the fault or negligence of Releasees, circumstances beyond Releasees' control, or otherwise, and including, but not limited to, my own activities before, during, and/or after the Program.
5. I further release Releasees and all other officials or professional personnel from any claim, liability, suit, debt, controversy, or dispute (including attorneys' fees and costs), of whatever kind or nature, either in law or in equity, on account of first aid, medical treatment or other health-related services rendered to me during my participation in the Program, and I shall assume full responsibility for payment of any such aid, medical treatment or other services so rendered.
6. I agree to indemnify Releasees from any loss, liability, damage or cost, including attorneys' fees and costs, they may incur growing out of, incidental to, related to, resulting directly or indirectly from, or in any way connected with my participation in the Program.
7. I understand and agree that, except as otherwise agreed to by CI in writing, the Releasees do not provide, carry, or maintain medical insurance and insurance coverage for claims related to bodily injury, loss of life, property damage, and/or economic damage to cover my participation in the Program. I am expected and encouraged to obtain my own health, medical, travel, disability, or other insurance coverage to insure against the risks and dangers assumed by me.
8. This Release and Waiver of Liability contains the entire agreement between the parties regarding the subjects referenced herein; all prior oral and written communications regarding the subjects referenced in this Release and Waiver of Liability are merged herein.
9. This Release and Waiver of Liability may not be modified or changed orally, but only by an agreement in writing signed by the parties hereto.
10. The performance, construction and enforcement of this Release and Waiver of Liability shall be governed by the laws of the District of Columbia without regard to the principles of conflicts of laws. I agree that any dispute, controversy or claim arising out of or relating to this Release and Waiver shall be settled by confidential arbitration before one arbitrator and administered by the International Centre for Dispute



Resolution ("ICDR"), a division of the American Arbitration Association ("AAA"), in accordance with its International Arbitration Rules, as at present in force. The arbitrator will be chosen by ICDR/AAA.

11. In case any provision (or any part of any provision) contained in this Release and Waiver of Liability shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect any other provision (or remaining part of the affected provision) of this Release and Waiver of Liability, which shall be construed as if such invalid, illegal or unenforceable provision (or part thereof) had never been contained herein but only to the extent it is invalid, illegal or enforceable.
12. I have been fully and completely advised of potential dangers incident to participation in the Program. I have carefully read the foregoing Release and Waiver of Liability, am fully aware of the legal consequences of signing it, and have signed it of my own free will.

Signature: _____ Date: _____

Printed Name: _____

Permission for Emergency Medical Treatment

I, **[full name]** _____, hereby grant Conservation International ("CI") permission to authorize medical treatment on my behalf, including, but not limited to, administration of antibiotics, anesthesia and other medications, transfusions or blood products, life-saving and other necessary surgical procedures, and hospitalization, in the event that I am unable, for any reason, to authorize or approve of such treatment on my own behalf. I further agree to indemnify and hold CI harmless for any or all actions growing out of, incidental to, relating to, resulting directly or indirectly from, or arising out of any such emergency medical treatment. I agree that CI does not have any duty, obligation or responsibility to authorize or seek medical treatment on my behalf. The Release and Waiver of Liability that I have executed related to my participation in the Program is incorporated by reference herein.

My emergency contact is: _____ (name, email, phone), and I hereby authorize CI to contact and provide pertinent information about my state (including medical information, to the extent available to CI) to my emergency contact in the event of danger to my health or life.

Signature: _____ Date: _____

Printed Name: _____

APPENDIX 4

[GOVT AGENCY] No-Objection Letter

[Letter on GOVT AGENCY letterhead]

[Date]

Conservation International Foundation



2011 Crystal Drive, Suite 600

Arlington, VA 22202

Attn: [CI STAFF]

Re: Permission Letter for CI's Engagement of [CONSULTANT NAME]

Dear [CI STAFF],

This letter is to confirm that [CONSULTANT NAME] is an existing [contractor/employee] of [GOVT AGENCY] and that [GOVT AGENCY] is aware that [CONSULTANT NAME] is entering into a Services Agreement with Conservation International Foundation ("CI") to provide services for the Project entitled "[PROJECT TITLE]." The services include [SERVICES SUMMARY] ("Services").

Services are estimated to cost [AMOUNT IN LOCAL CURRENCY], which may be paid to [CONSULTANT NAME] in accordance with the final terms of the Services Agreement.

[GOVT AGENCY] hereby confirms that: (a) it consents to [CONSULTANT NAME] entering into a Services Agreement with CI and having [CONSULTANT NAME] perform the Services and receive compensation for such Services; and (b) that by entering into a Services Agreement, [CONSULTANT NAME] is not in breach of any existing contractual obligations with [GOVT AGENCY] or other rules or regulations applicable to Service Provider as a government employee/official.

Best regards,

[Name]

[Title]