

## **REQUEST FOR PROPOSALS**

**Title:** Technical Service Provider for Latin America Coffee Carbon Footprint Baseline Study

**RFP No.:** FY2024 SCC-001

- 1. Date of Issuance:** March 7, 2024 Amended on March 21 2024; **Proposal Submission Details Amended from March 31 2024 to April 5 2024**
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### **2. Background**

Conservation International (hereafter referred to as “CI”) protects nature for the benefit of humanity. Through science, policy, fieldwork, and finance, we spotlight and secure the most important places in nature for the climate, for biodiversity, and for people. With offices in 30 countries and projects in more than 100 countries, CI partners with governments, companies, civil society, Indigenous peoples, and local communities in order to help people and nature thrive together. CI has been working for 25+ years on coffee sustainability.

Since December 2015, CI has been leading the Sustainable Coffee Challenge (hereafter referred to as “the Challenge”). The Challenge is a global multi-stakeholder coalition that convenes, unites, and urges stakeholders from across the coffee sector to spur the actions and investments necessary to make coffee the first sustainable agricultural product in the world. As part of their broader collective commitments, partners in the Challenge have pledged to “secure 100 million tons of carbon” by 2025. This project is part of that commitment.

### **3. Project Overview**

CI is seeking an experienced and qualified organization (hereafter referred to as “the consulting organization”) to support CI’s Sustainable Coffee Challenge team in the development and implementation of a pre-competitive study to establish national carbon footprint baselines in five coffee-producing origins in Latin America<sup>1</sup> (Brazil, Colombia, Honduras, Mexico, and Peru). This initiative will replicate and build on a study led by USAID Green Invest Asia (hereafter referred to as the GIA study) that established national carbon footprint baselines for Robusta coffee production in Vietnam and Indonesia; the GIA study was finalized in June 2023.<sup>2</sup>

The current study, under the direction of CI, continues to address the urgent needs across the coffee sector to enhance the availability and consistency of on-farm coffee carbon footprint data (collected using an aligned and consistent methodology). The aim is for the consulting organization to establish – with support from CI and a Project Lead – industry-accepted and statistically-sound national carbon footprint baselines for Arabica and Robusta coffee production in the five origins (potentially, sub-national baselines to be established where possible/applicable). Additionally, the study will develop:

- An improved framework and mechanism for regular data collection, sharing, and analysis to facilitate impact monitoring and reporting, both by individual companies and at the aggregate sector and/or country level.

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<sup>1</sup> A phased approach is envisioned to implement the full scope of the proposed study, both in terms of geography as well as activities. The implementation strategy and sequencing will follow consensus from consortium partners and available resources. More information can be found throughout the remainder of this RFP.

<sup>2</sup> Final report can be found here: <https://www.climatelinks.org/resources/establishing-carbon-footprint-baselines-robusta-coffee-production-southeast-asia>

- Improved sector-wide awareness on building data collection plans and monitoring, reporting, and verification (MRV) techniques for carbon baselining and tracking, as part of both new and existing programming.
- Increased capacities of supply chain actors to understand, document, and report on carbon emissions and sequestration in coffee systems, using both newly-collected and existing data.
- Successful pre-competitive collaboration to accelerate climate action through the establishment of replication protocol to other origins and commodities, and insight into investment opportunities.

The latest version of the study's project description is available upon request at [scc.consultant@conservation.org](mailto:scc.consultant@conservation.org).

#### 4. Terms of Reference, Deliverables, and Deliverables Schedule

The consulting organization will engage with CI, the Project Lead, and the project's consortium partners (funders)<sup>3</sup> to develop national carbon footprint baselines for each origin through a phased approach. The consulting organization will be responsible for 1) collaboratively developing a project work-plan; 2) designing a representative sampling framework to collect data from the five origins<sup>4</sup>; 3) developing and translating standardized farmer data collection surveys that are aligned/compatible with the Cool Farm Tool (CFT) perennials module; 4) assessing the feasibility of using existing data to answer survey questions or support sampling, and identify data gaps beyond this; 5) developing and implementing online training for enumerators (to be sourced from approximately 10 recruited supplier-partners)<sup>5</sup> in the use of the survey templates that will gather the data to fill gaps; 6) guiding data collection and offering support as needed to enumerators; 7) compiling, cleaning, and analyzing the farmer data provided by the supplier-partners; 8) integrating geospatial data, including data on historic land use change as possible; 9) conducting a comparative analysis of different carbon footprints using different tools as possible, to improve confidence in the CFT results;<sup>6</sup> 10) authoring technical reports on all findings; and 11) participating in meetings for internal and external communications as relevant. The consulting organization will also play a key role in creating technical awareness and fomenting technical consensus among the project's consortium partners, and will work closely with the Project Lead and the rest of the coffee team within CI's Center for Sustainable Lands & Waters. The consulting organization will report to the Director of Sustainable Coffee Partnerships.

##### A. Timeframe for the Assignment

I. The timeline for the contract is anticipated to be one year between March 2024 – January/February 2025). The consulting organization will be required to deliver the following:

- Kickoff Meeting:** After being formally contracted, the consulting organization will host a kickoff meeting with relevant partners to discuss the project, their strategic approach and methodology, the details of their planned activities and processes, their expected timelines, and their key team member roles. A key deliverable post-meeting will be an

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<sup>3</sup> Costa Coffee, JDE Peet's, Lavazza, Keurig Dr Pepper, Melitta, Nestle, Starbucks, and Tchibo.

<sup>4</sup> We are considering Arabica coffee production for all five origins, and Robusta coffee production in only Brazil and Mexico. At a maximum, we would have seven baselines: one Arabica baseline for each origin, and two additional Robusta baselines for Brazil and Mexico.

<sup>5</sup> Supplier-partners (i.e., traders) will be invited to participate in this study if they are key suppliers of the project's consortium partners. They will offer in-kind support, in the form of tasking their field staff, agronomists, and enumerators with collecting data from many farms/farmers. A list of potential supplier-partners is available upon request.

<sup>6</sup> The execution of numbers 8 and 9 are dependent on funding. Offerors have the option to submit their proposal and budget for these items, but it is not necessary. If Offerors decide to submit a proposal and budget for these items, the proposal and budget should be separate from the broader proposal. Offerors may also indicate their interest and capacity in submitting a proposal in the future should funding become available.

updated project work-plan. This workplan may be subject to a third-party review (CI will recruit third-party reviewers from trusted partner organizations).

- ii. **Adapt Representative Sampling Framework:** The geographic scope of this assignment is focused on five origins. For the purposes of the national carbon footprint analysis, the specific geographic boundaries of the Arabica and Robusta coffee areas surveyed will be clearly defined and finalized in conversation with consortium partners, as this will influence the overall sampling design. For emissions accounting, the boundary for the baseline carbon footprint assessment is the farm gate; in other words, greenhouse gas (GHG) emissions and carbon sequestration on coffee farms, or those directly associated with coffee production. Emissions from the downstream segment of the supply chain from farm gate to port, via collectors and key supplier partners, are considered outside the scope of the current assignment.

To begin the assignment's technical work, the consulting organization will propose a specific approach to adapting the statistically representative sampling framework used in the GIA project, which required a sample size of 2000-2500 farms per origin. The consulting organization should explain how the adapted framework will 1) be applied in each origin to gather either national or sub-national samples and 2) consider the mean and standard deviation of farm level carbon footprint estimates. Offerors may suggest alternative methods to confirm sampling sizes (e.g., samples based on total area under production). Regardless, the approach should consider that field data will be collected through surveys, which will be applied by participating supplier-partners (i.e., traders who are supporting the project in-kind via data collection).<sup>7</sup> When describing the approach, the consulting organization may reference project boundaries and scope, appropriate sample sizes, relevant data sources, important carbon pools and emissions sources for consideration, key methodologies/standards, opportunities for scale, and other relevant factors – such as the number of iterations necessary to confirm an appropriate sample. In conjunction with describing the adapted sampling approach, the consulting organization should also describe measures for avoiding bias and ensuring true representativeness. Before finalization, the adapted representative sampling approach may be subject to a third-party review (CI will recruit third-party reviewers from trusted partner organizations).

*\*Of note, once a representative sampling strategy is designed and a sample population of targeted farms is determined, data collection efforts will be equitably allocated among participating supplier-partners. Their share of work is voluntary, and allocations may be based on their contribution to overall volumes sourced, and/or their existing technical capacities, resources, and on-the-ground presence. Offerors should propose their suggested approach for how they will ensure data collection is equitably allocated among participating supplier-partners.*

- iii. **Standardized Farm Survey:** Next, the consulting organization will develop a standardized farm survey template based on and aligned with the CFT and its new perennials module, which is an industry-accepted online calculator that quantifies on-farm GHG emissions and carbon sequestration. The survey may also include additional (i.e., non-CFT) data inputs helpful to complement the analyses where needed. Offerors should clarify how the survey inputs will lead to proper estimation of

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<sup>7</sup> If desired by the supplier-partners, there exists the possibility that they will want to contribute financially instead of in-kind, which would require us to hire enumerators for data collection on their behalf. Offerors can consider addressing this issue in their proposal.

carbon emissions and sequestration, particularly for above-ground, below-ground, and soil carbon pools. In other words, Offerors need to provide a clear plan on how they propose to estimate and confirm carbon emissions and sequestration *separately and effectively*. Efforts should also be made to ensure that the methodology/survey is aligned, to the extent possible, with international and relevant standards; these standards should be noted by Offerors in their proposal. Of note, finalized survey templates will need to be translated from English to both Brazilian Portuguese and Latin American Spanish, and Offerors should clearly identify the proposed format(s), digital or other, of the survey template(s) to be developed, and express how such format(s) will be decided upon collectively for each of the five origins. Offerors should explain whether these format(s) have offline capability and indicate how the chosen format(s) and translations will consider data quality.

- iv. **Assess Potential of Using Existing Data:** On-farm data collection is anticipated to be conducted primarily by participating supplier-partners. The crux of doing this work cost-effectively and at-scale for all parties involved is that no single supplier-partner is required to conduct large-scale data collection on their own. As such, it is our goal that existing data be used/referenced if possible. Offerors should describe a clear plan for how they will first assess the feasibility of using existing data to support sampling and/or survey implementation, and second, incorporate this existing data into their analysis and training plans. Offerors must remember to treat data confidentially.
- v. **Data Enumerators Training (virtual):** Once the farm survey template is developed, the consulting organization will develop an online training methodology to equip field staff and agronomists from participating supplier-partner companies with the skills they need to carry out data collection. Training should be made available in Brazilian Portuguese and Latin American Spanish.
- vi. **Data Collection by Supplier-Partners:** Participating supplier-partners are expected to be jointly responsible for on-farm/field data collection that is consistent with the overall sample design (partner allocations will be determined and agreed upon prior to data collection in each origin). Post-data collection, each supplier-partner will be expected to deliver a consolidated data set using a standardized template provided by the consulting organization. The consulting organization should make themselves available to provide ongoing guidance and remote survey support as needed during the data collection phase and should outline these plans in their proposal; the consulting organization should also outline plans to support data consolidation.

*\*Of note, data collection may be taking place during non-representative harvest years. Offerors should include in their proposal an indication of how they will assess whether current harvest years in the five origins are representative, and how this will ultimately impact the study's results.*

- vii. **Data Compilation, Cleaning, and Analysis:** The consulting organization will consolidate all the data provided by supplier-partners into a single database (one per origin) for proper analysis. Data must be treated as confidential to ensure farmer anonymity (including GPS point and/or polygon anonymity) and the integrity of supplier-partner intellectual property. Consequently, no specific attribution should be made of any individual partner company or farmer in publicly available results, findings, or recommendations. At the end of the assignment, each participating

supplier-partner will receive a copy of the cleaned raw data in Excel format to use for their own purposes. Once again, any company- or farmer-specific identifiers will be scrubbed from this database, so that data points cannot be linked to specific companies or farm(er)s. In their proposal, Offerors should clarify their approach to ensuring social safeguards, including confidentiality and Free, Prior, and Informed Consent (FPIC).

After consolidation, the consulting organization will be responsible for data cleaning and quality control, and the data sets will be analyzed using the CFT perennials module to estimate the emissions (carbon footprint) and sequestration associated with Arabica and Robusta coffee production for each of the origins. Emissions and sequestration results should be reported separately in all analyses. Estimates must be reported in tons CO<sub>2</sub>e per ton GBE (green bean equivalent) and in tons CO<sub>2</sub>e per hectare (ha), as well as disaggregated by 1) main sources (e.g. fertilizer, energy, waste, land use change, residue management, shade trees, etc.); 2) different archetypes (crop diversification, intensity of coffee farming, farm size, presence of regenerative agricultural practices, input use, and shade level)<sup>8</sup>; 3) sustainability standard/certification (e.g., conventional, certified); and 4) priority geographies (e.g., regions, districts,) where possible. In their proposal, Offerors should clarify their approach to data quality and disaggregated analysis.

In addition to establishing the national carbon footprint baselines for the five origins, additional analyses shall be conducted with the data sets, aligned with the interests of consortium partners. Key Questions to be addressed through such analyses should be discussed and finalized with the partners in advance, but are expected to include the following questions:

- What are the main coffee production archetypes (farm models) found in each of the five origins?
- Are there significant differences in carbon footprint (emissions and sequestration) between the different origins and within the archetypes identified in those origins? What are the main drivers for emissions and what are the differences seen between origins/archetypes? What are the carbon sequestration potentials per hectare by archetype (tons CO<sub>2</sub>e/ha/yr)? Are there significant differences in the net CO<sub>2</sub>e footprints by archetype and/or farm size? Are there significant differences in carbon emissions by emission source (e.g. land use change, fertilizer, and energy use) by archetype?
- What is the geographic distribution of farms with higher-than-average carbon footprints? Which districts/locations have higher-than-average footprints?
- How does the new CFT perennials module align with the SBTi and forthcoming GHG Protocol (GHGP) requirements?
- How can the CFT perennial modules estimate levels of soil carbon when farm-level data is available (i.e., when CFT default values are not used)? How does the default function work and align with SBTi? How does this impact the CFT's sequestration claims?
- How feasible is the CFT perennials module at scale (e.g., when collecting carbon footprints from many farmers)? What are suggested opportunities for scale (e.g.,

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<sup>8</sup> These are the preferred archetypes at this point, but final archetypes will be based on feasibility and through discussion with consortium partners.



how often should carbon data be collected, and how much data needs to be collected each year)? How does the diversity of farming practices/origins in a particular supply chain affect a company's data collection needs?

- viii. Geospatial Analysis:** To aid in the carbon footprint analysis, remote sensing data, geospatial data, machine learning data, and other available data sources *may be integrated* into the final analysis where practical, relevant, and cost-effective (key emphasis should be placed on data that reflects emissions from historic land use change resulting from coffee farm expansion). *Pending available funding*, complementary GIS mapping may be implemented by the consulting organization (polygons preferred), by dedicated GIS experts within CI, or by another partner organization. *Should Offerors wish to elaborate in their own proposal their approach to conducting GIS mapping as part of this assignment, they are free to do, but it is not required.* Regardless, as possible, the consulting organization will be tasked with incorporating data if it becomes available (i.e., whether it be provided by supplier-partners from existing databases, or newly-collected as part of this project), such as GPS coordinates or preferably polygons for each farm, as this will enable geospatial analysis of the data sets (mapping of historical deforestation linked to coffee expansion can provide additional data to aid in estimating emissions from land use change and associated emissions factors for specific areas). As such, even if they do not propose to conduct GIS mapping themselves, Offerors should describe their approach to integrating geospatial analyses into this initiative if data becomes available, including reference to specific tools, methodologies, data sets, etc.

In addition, remote sensing and other machine learning tools are also being applied to assess and monitor carbon stocks in above-ground biomass, below-ground biomass and soils. It may be feasible to cost-effectively apply these technologies in service of the overall carbon footprint baseline in the 5 origins. Once again, should the consulting organization wish to elaborate on their own proposal to apply such technologies as part of this assignment, they are free to do so in their application. Regardless, as possible, the consulting organization will be tasked with incorporating related and available data (whether it be provided by supplier-partners from existing databases, or newly-collected as part of this project pending available funding) into their analysis. This should only be proposed if practical and cost-effective, and Offerors should explain how the integration of such data will increase confidence in the results provided through farmer surveys and the CFT. Maps summarizing key findings, hotspots, and geographic distributions may also be utilized to highlight trends and locations within the geographies.

- ix. Comparative Analysis:** *Pending available funding*, a subset of the compiled data set will be utilized by the consulting organization to conduct a comparative analysis. This analysis will benchmark the project results derived from the CFT perennials modules against at least two other tools/methodologies to triangulate results and improve confidence in the findings. The consulting organization will be responsible for recommending these other specific tools and methodologies based on a comparison of available tools, approaches, and models in the marketplace, though the final tools will be subject to discussion and finalization with consortium partners. Some consortium partners may be able to share the existing carbon footprint tool(s) they are currently using for this comparison. When describing the approach to the comparative analysis, Offerors should specifically address how both emissions as well as carbon

sequestration in coffee systems can be considered, and how key areas of consistency and differences among tools will likely impact results. Where important differences in results are found, the comparative analysis should attempt to identify and explain those in terms of the specific emissions factors, assumptions, and/or models used within the tools to the degree possible. Implications of discrepancies should also be properly documented. Offerors should describe in their proposal their specific approach to comparative analysis, with a list of their key considerations, and their approach to confirming recommended tools.

- x. Draft and Final Reports:** The consulting organization will prepare draft technical reports (one report for each country) as well as a final synthesis report that summarizes 1) the overall project activities; 2) the representative sampling approach and analysis methodologies; 3) the carbon footprint results for each of the coffee origins<sup>9</sup>; and 4) the comparative analysis (including reference to the approach, tools used, and key findings) to increase the visibility of the project findings. Technical report outlines and the final synthesis report outline will be proposed and agreed to before drafting. Consortium partners shall be provided with a chance to review and provide comments on the outlines and the initial drafts, and all final reports will be prepared incorporating all relevant feedback. As part of the final synthesis report, lessons learned from the collaboration should also be documented and recommendations should be provided to partners with respect to 1) future representative sampling designs; 2) the development of data collection systems and processes to facilitate future efforts; 3) suggestions for addressing any gaps identified in the study; 4) opportunities for study replication to other origins; and 5) opportunities for targeted investment. All final reports should be made available in both MS Word and PDF format; the final synthesis report should include an Executive Summary. Also, the consulting organization will prepare a high-level summary of the reports in one PowerPoint. Also, key results and findings will be shared with coffee sector stakeholders through a webinar, which the consulting organization will be expected to attend (among other potential webinars throughout the project's lifecycle).

#### **B. Deliverables & Deliverables Schedule**

<b>Activity</b>	<b>Milestone</b>	<b>Deliverables</b>	<b>Timeframe</b>
i. Project Initiation and final Study Design/Prep	<ul style="list-style-type: none"> <li>- Consortium established</li> <li>- Clarification reached on strategic approach, activities, timeline, roles, etc.</li> <li>- Final elements of study design confirmed by consortium partners and reviewed by third-party</li> </ul>	<ul style="list-style-type: none"> <li>- Project-lead and TSP selected and contracted</li> <li>- Updated project documentation (finalized and ready for launch)</li> <li>- Third-party sign-off on study design</li> </ul>	Sept - April 2024
ii. Adapt Representative Sampling Framework from GIA Project	<ul style="list-style-type: none"> <li>- Sampling plans for the five origins developed and agreed upon by consortium partners and supplier-partners; sampling</li> </ul>	<ul style="list-style-type: none"> <li>- Representative sample design and plan, including allocation for supplier-partners</li> </ul>	Beginning April 2024

<sup>9</sup> With reference to study limitations, such as non-representative harvest years.

	plans reviewed by third-party	-Third-party sign-off of sampling plan	
iii. Standardized Farm Survey	- Surveys designed in alignment with the Cool Farm Tool (CFT); (digital) survey format agreed upon by consortium partners and supplier-partners	- Standardized farm survey templates created in proper formats, in alignment with CFT; three versions created (English, Portuguese, Spanish) - Sample farms identified	End April 2024
iv. Assess Potential of Using Existing Data	- Review of existing data to confirm relevant sample and potential of use for footprint results - Existing data mapped and provided to TSP	- Feasibility of existing data reviewed and confirmed by TSP - All relevant existing data collected and stored by TSP	End April 2024
v. Field Training	- Agronomists/field staff of supplier-partners trained in new data collection, use of CFT, etc.	- Online training documents for agronomists/staff of supplier-partners in Portuguese and Spanish	End April 2024
vi. Data Collection by Supplier-Partners	- Additionally-needed data collected by suppliers (after harvest seasons where feasible) - Qualitative research process to understand data collection successes and challenges (lead by Project Lead)	- Raw data consolidated and anonymized into shareable Excel data sets - Focus group session analyses developed capturing external stakeholder/expert feedback on lessons learned to date	May-August 2024 <sup>10</sup>  <u>May:</u> Peru (7 months post-harvest); Brazil (5 months post-harvest) <u>June:</u> Colombia (4 months post-harvest in Huila; 6 months post-harvest in Tolima; mid-main-crop harvest in Nariño and Cauca) <u>July:</u> Honduras (3 months post-harvest) <u>August:</u> Mexico (3 months post-harvest)
vii. Data Compilation, Cleaning, and Analysis	- Data cleaned, analyzed, interpreted, and presented	- Carbon footprints established for each origin -Graphs, data organized into shareable formats, etc.	September-October 2024

<sup>10</sup> The months listed indicate start dates of data collection. It is likely that data collection will take at least two months per country.



viii. Geospatial Analysis (Pending available funding)	- GIS mapping conducted - Remote sensing tools applied - Geospatial data analysis incorporated	- Maps and land use change emission factors established for key production areas, among other items - Graphs, data organized into shareable formats, etc.	May-October 2024
iv. Comparative Analysis (Pending available funding)	- Comparative data analysis using different methodologies and tools to triangulate and benchmark results (tools to be confirmed by consortium partners)	- Comparative analysis section of final report drafted - Graphs, data organized into shareable formats, etc.	October-November 2024
v. Draft and Final Reports	- Draft and Final Reports summarizing results and other items completed (e.g. emissions and sequestration, lessons learned, scaling recommendations, etc.)	- Draft and final reports in MS Word and PDF format, with Executive Summary - Accompanying PowerPoint presentation - Public facing webinar(s) on study results	December 2024-January 2025

### C. Location of Task & Travel

Services required will be performed primarily remotely. The focal areas of the five origins countries will be determined by or in collaboration with consortium partners; given the role of supplier-partners in on-the-ground data collection, it is not envisioned that the consulting organization will need to travel to these countries.

## 5. Proposal Submission Details

- A. **Deadline.** Proposals must be received no later **no later than April 5, 2024 COB EDT**. 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.** 90 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.

### Proposal Timeline

RFP Issued	7 March 2024
Clarifications submitted to CI	15 March 2024
Clarifications provided to known bidders	20 March 2024

Complete proposals due to CI	April 5 2024
Final selection	11 April 2024

## 6. Minimum Requirements

Qualifications of the applying organization should include:

- In-depth knowledge of and demonstrable expertise in carbon footprint accounting for agricultural production, with a particular emphasis on Scope 3 emissions and mitigation efforts in perennial crop systems (coffee in particular);
- Expertise in carbon-related accounting protocol and its relevance/impact for the coffee sector (e.g., thorough knowledge of GHGP accounting and SBTi FLAG target-setting requirements);
- Expert understanding of the on-farm practices that contribute to GHG footprint calculations, with insight into the archetypes and disaggregation that impact results;
- Knowledge of situation and realities on-the-ground in coffee producing countries (experience with running projects in the five countries in scope preferred);
- In-depth knowledge of and demonstrable expertise in developing and guiding quantitative data sampling methodologies;
- Experience and expertise in guiding data collection remotely as well as in quantitative data consolidation, cleaning, analysis, and visualization (demonstrative experience with large data sets required);
- Outstanding written and verbal communication skills, including the ability to translate technical information to both technical and non-technical audiences (demonstrable expertise in communicating with the public and private sector preferred);
- English, Spanish and Portuguese language skills are required among the consulting organization team, while organizational presence in the countries of focus is preferred.

## 7. 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. **Qualifications:** Summarize relevant capabilities, experience, past performance, and provide at least three client references. Please attach CVs that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
  - ii. **Technical Approach, Methodology and Detailed Work Plan.** The Technical Proposal should describe in detail (10 pages max) how the bidder intends to carry out the requirements described in the Terms of Reference (Section 3 of this document). Alongside a description of the technical approach to the assignment, the Offeror should include a work plan and timeline, and reference to their management and staffing plan.
  - iii. **Financial Proposal.** Offerors shall use the cost proposal template (Attachment 2). Offerors must submit a budget summary and their fee for services based on a rate per hour/day. The fee for services must be expressed in USD and 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 agreed upon or requested by CI should the Offeror's proposal be accepted. As such, financial proposals should be inclusive of all fees needed to carry out the assignment (i.e. beyond consulting time).

## 8. 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)
<b>Approach:</b> Is the proposed approach appropriate to the assignment? Particularly, does the presentation provide a logical and practical presentation and planning of the tasks and activities, which promises efficient project implementation?	30%/ Max points
<b>Expertise &amp; Experience:</b> Does the bidder and (if relevant) the proposed personnel meet the minimum required expertise and skills for the assignment? Does the bidder's past performance demonstrate recent proven experience doing similar work?	35%/ Max points
<b>Cost:</b> Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment.	35%/ Max points

## 9. Resulting Award

CI anticipates entering into an agreement with the selected bidder by [April 24, 2024] at the latest. 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. CI'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).

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

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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 of, 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 the award, and revisions to proposed costs may not be made after submission unless expressly requested by CI, should the Offeror's proposal be accepted. Nevertheless, for the purpose of the proposal, Offerors must provide a detailed budget showing major expense line items. Offerors 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, the 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 the Offeror is eligible to apply for refunds on taxes paid, the Offeror shall do so. Any tax savings should be reflected in the total cost.

### Required Cost Breakdown by Deliverable

Please include this template below as a summary of all fees.

<b>Deliverable</b>	<b>Price (Lump Sum, All Inclusive)</b>
i. Project Initiation and final Study Design/Prep	
ii. Adapt Representative Sampling Framework from GIA Project	
iii. Standardized Farm Survey	
iv. Assess Potential of Using Existing Data	
v. Field Training	
vi. Data Collection by Supplier-Partners	
vii. Data Compilation, Cleaning, and Analysis	
viii. Geospatial Analysis (if including in proposal)	
iv. Comparative Analysis (if including in proposal)	
v. Draft and Final Reports	

### Sample Cost Breakdown by Cost Component

In addition, please provide a cost breakdown, following a similar structure seen below, to provide further detail on the cost of each deliverable above.

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



<b>Total Cost of Financial Proposal</b>				
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