

## **Call for Proposals**

### **Graphic Design of the Critical Ecosystem Partnership Fund's Annual/Impact Report**

**Opening Date:** 13 January 2022

**Closing Date:** 4 February 2022

**Questions Due Date:** 31 January 2022

**Submission:** Proposals should be sent **to [cepf@cepf.net](mailto:cepf@cepf.net) by 5 p.m. (EST)** on the closing date.

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## **Section 1. Instructions and General Guidance**

### **1.1 Introduction**

Conservation International, the Contracting Entity, is soliciting offers from consultants to submit proposals to carry out graphic design of the CEPF Annual/Impact Report.

#### **OBJECTIVES:**

In the past, CEPF has produced annually both an [Impact Report](#) featuring results data from inception of the fund and an [annual report](#) focused on data and events from the most recent fiscal year. For fiscal year 2021, we will produce a combined annual/impact report. We expect this report to be 100 pages and of a similar visual style to last year's reports. We are aiming to complete the project by May 2022.

Objectives of the report include:

- Sharing the impact CEPF grantees have made on biodiversity conservation and other "pillars" of the CEPF program from the start of CEPF grantmaking in 2001 through the end of the last fiscal year (June 30, 2021).
- Making a compelling case for the effectiveness of CEPF grantees/civil society organizations in biodiversity conservation and the importance of their work.
- Making the results of CEPF's grants clear, both from an annual perspective and by sharing impact data from inception of the fund to reinforce positive relationships with our donors, attract new donors and recognize the good work of our grantees, which may help them gain future donors and further their progress on biodiversity conservation.

### **1.2 Offer Deadline**

Offerors shall submit their offers electronically at the following email address, [cepf@cepf.net](mailto:cepf@cepf.net).

Offers must be received no later than **5 p.m. EST February 4**. Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers will not be considered.

### **1.3 Instruction for Offerors**

All proposals must be submitted in one volume, consisting of:

- Technical proposal
- Cost proposal, and
- Offeror Representation of Transparency, Integrity, Environmental and Social Responsibility (see page 8). **[This document must be signed by the Offerors or (Offerors representative) and submitted with the Offeror's proposal.]**

This call for proposals does not obligate Conservation International to execute a contract nor does it commit Conservation International to pay any costs incurred in the preparation or submission of the proposals. Furthermore, Conservation International reserves the right to reject any and all offers, if such action is considered to be in the best interest of Conservation International.

**A. Technical Proposal**

The technical proposal shall comprise the following parts:

- Part 1: Approach and Work Plan.

The technical proposal should describe how the offeror intends to carry out the requirements described in Section 2, Scope of Work (SOW). The technical proposal should demonstrate a clear understanding of the work to be undertaken and the responsibilities of all parties involved.

- Part 2: Capabilities, experience, past performance, and 3 client references. Please include a CV, design examples and/or a link to a portfolio that includes similar projects or assignments, and at least three client references.

**B. Cost Proposal**

Offerors shall use the cost proposal template “Detailed Budget” in section 2.1. The cost proposal must be valid for at least 90 days after submission to Conservation International. The cost proposal is used to determine which proposals are the most advantageous and serves as a basis of negotiation for award of a contract. The cost proposal must be all-inclusive of profit and fees. Additional costs cannot be included after award, and revisions to proposed costs may not be made after submission unless expressly requested by Conservation International should the offerors proposal be accepted. All cost information must be expressed in US dollars. The cost shall also include a budget narrative that explains the basis for the estimate of every cost element or line item. Supporting information must be provided in sufficient detail to allow for a complete analysis of each cost element or line item. Conservation International reserves the right to request additional cost information if the evaluation committee has concerns of the reasonableness or completeness of an Offeror’s cost proposal.

**Offeror Proposed Detailed Budget [This document to be filled by the Offerors or (Offerors representative) and must be submitted along with Technical Proposal to Conservation International]].**

<b>Description OF SERVICE</b>	<b>DAILY OR</b>	<b>other costs (local currency)</b>	<b>Total Cost (local currency)</b>
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	<b>HOURLY Cost</b>
<b>Total</b>	

#### **1.4. Chronological List of Proposal Events**

The following calendar summarizes important dates in the solicitation process. Offerors must strictly follow these deadlines.

**Call for proposals published: 13 January 2022**  
**Deadline for written questions: 31 January 2022**  
**Proposal due date: 4 February 2022**

The dates above may be modified at the sole discretion of Conservation International. Any changes will be published/advertised in an amendment to this call for proposals.

#### **1.5. Evaluation and Basis for Award**

An award will be made to the Offeror whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this call for proposals, meets the technical capability requirements, and is determined to represent the most advantageous to Conservation International.

<b>Criteria/maximum points</b>	<b>Applicant score</b>
Quality of design portfolio – 35 pts	
Compatibility with CEPF brand/style – 15 pts	
Experience in design of similar reports – 30 pts	
Appropriateness of cost estimate – 20 pts	

## **Section 2. Scope of Work, Deliverables, and Deliverables Schedule**

### **2.1. Scope of Work**

The “Services” shall consist of, and the successful offeror shall provide, all graphic design services necessary to produce a high-quality report. Pursuant to this call for proposals, the services must meet the following minimum criteria:

- Development of 3 initial conceptual design layouts.
- Refinement of design concept based on CEPF feedback.
- Design of 100-page report (including cover), including text formatting, creating tables, charts and infographics, and incorporation of photography (to be chosen from CEPF’s photo collection).
- Work with CEPF Communications to gather printer estimates.
- Implement all edits provided by CEPF including those from donors.
- Prepare final file and send to printer.
- Work with the printer to ensure printing is completed to specification (including checking colors, making sure photos are clear, ensuring text appears as formatted in design files, etc. – includes proof check).
- Provide to CEPF both low- and high-resolution PDFs of the final version of the report (low-res version for use on website) and inDesign files for the report.

## 2.2. Deliverables & Deliverables Schedule

#	Activity	Due Date*	Deliverable
1	- 3 initial conceptual design layouts - Refine design selected by CEPF and make edits based on feedback	March 2	Design concept approved by CEPF communications director.
2	- Design and production of an estimated 100-page (including cover) Annual/Impact Report, including text formatting, creating tables, charts and infographics, and incorporation of photography (to be chosen from CEPF’s photo collection)	April 11 <i>*Assumes all content has been handed off to designer no later than March 11. Adjustment to schedule may be needed/approved by CEPF if CEPF does not meet that deadline.</i>	All content placed in report layout/design, and all edits from CEPF received to date are implemented to produce a draft to be shared with donors.
3	- Implement all edits provided by CEPF including those from donors - Prepare final file and send to printer - Work with the printer to ensure printing is completed	May 23 <i>*Assumes all content was handed off to designer no later than March 11. Adjustment to schedule may be needed/approved by CEPF if CEPF does not meet that deadline.</i>	All edits requested by CEPF are implemented. All necessary files are supplied to the printer. Proof from the printer is checked for quality control.

	to specification (including checking colors, making sure photos are clear, ensuring text appears as formatted in design files, etc. – includes proof check)		
4	Provide to CEPF Communications both low- and high-resolution PDFs of the final version of the report (low-res version for use on website) and inDesign files for the report.	May 31	All files provided to CEPF.

*\*Due dates and other details of deliverables to be finalized in consultation with selected designer.*

**Deliverable acceptance criteria**

- Design concept approved by CEPF executive director and communications director.
- All report content integrated into the designed document.
- All CEPF-requested edits/changes implemented for report.
- Report completed and printed and associated final files provided by anticipated delivery date or by mutually agreed alternative deadline.

**Section 3. Procurement and Contract Standards.**

**3.1 Code of Ethics**

1. Scope of Applicability

The following ethics standards apply to all persons and entities which receive, are responsible for the deposit or transfer of, or take or influence decisions regarding the use of Grant Funds received from CI (jointly referred to as ‘Grant Fund Recipients’). Grant Funds Recipients include employees, agents, sub-contractors and sub-recipients of the aforementioned persons and entities.

2. Ethics Standards

Grant Funds Recipients are expected to observe the highest standards of professional and personal ethics in the implementation of projects funded by the CI.

**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).**

Grantee shall communicate and advertise the below ethics standards and the availability of the Ethics Hotline for Project related complaints to all Grant Fund Recipients.

Grant Funds Recipients are required to implement, monitor and enforce compliance with a Code of Ethics that substantially reflects the following ethics standards:

**Integrity:**

- Act in good faith, responsibly, with due care, competence and diligence and maintain the highest professional standards at all times.
- Comply with Funding Terms and Conditions, internal policies of the Grantee as well as all applicable laws, rules and regulations, domestic and international, in every country where the Grantee does business and where Project related activities are carried out.
- Reflect actual expenses or work performed in expense reports, time sheets, and other records.
- Never engage in any of the following acts: falsification of business documents, theft, embezzlement, diversion of funds, bribery, or fraud.

**Transparency:**

- Perform duties, exercise authority and use Grant Funds and assets procured with Grant Funds for Project purposes and never for personal benefit.
- Avoid conflicts of interest and not allow independent judgment to be compromised.
- Not accept gifts or favors from Project vendors/suppliers, sub-recipients or sub-contractors in excess of token gifts.

**Accountability:**

- Disclose to CI, at the earliest opportunity, any information they have or become aware of, that may result in a real or perceived conflict of interest or impropriety.
- Exercise responsible stewardship over Grant Funds and assets procured with Grant Funds; spend Funds wisely, in furtherance of the Project.
- Manage programs, activities, staff and operations in a professionally sound manner, with knowledge and wisdom, and with the goal of a successful Project outcome.

**Confidentiality:**

- Not disclose confidential or sensitive information obtained during the course of the Project

**Mutual Respect and Collaboration:**

- Assist CI, Project partners and beneficiaries in building the necessary capacity to carry out the Project efficiently and effectively and to manage Funds in a fiscally and operationally prudent manner.

### **3.2. Statement of Integrity, Eligibility and Environmental and Social Responsibility**

1. We recognise and accept that *Agence Française de Développement* ("**AFD**") only finances projects of the Contracting Authority subject to its own conditions which are set out in the Financing Agreement which benefits directly or indirectly to the Contracting Authority. As a matter of consequence, no legal relationship exists between AFD and our company, our joint venture or our suppliers, contractors, subcontractors, consultants or subconsultants. The Contracting Authority retains exclusive responsibility for the preparation and implementation of the procurement process and performance of the contract. The Contracting Authority means the Purchaser, the Employer, the Client, as the case may be, for the procurement of

goods, works, plants, consulting services or non-consulting services.

2. We hereby certify that neither we nor any other member of our joint venture or any of our suppliers, contractors, subcontractors, consultants or subconsultants are in any of the following situations:
  - 2.1 Being bankrupt, wound up or ceasing our activities, having our activities administered by the courts, having entered into receivership, reorganisation or being in any analogous situation arising from any similar procedure;
  - 2.2 Having been:
    - a) convicted, within the past five years by a court decision, which has the force of *res judicata* in the country where the Contract is implemented, of fraud, corruption or of any other offense committed during a procurement process or performance of a contract (in the event of such conviction, you may attach to this Statement of Integrity supporting information showing that this conviction is not relevant in the context of this Contract);
    - b) subject to an administrative sanction within the past five years by the European Union or by the competent authorities of the country where we are constituted, for fraud, corruption or for any other offense committed during a procurement process or performance of a contract (in the event of such sanction, you may attach to this Statement of Integrity supporting information showing that this sanction is not relevant in the context of this Contract);
    - c) convicted, within the past five years by a court decision, which has the force of *res judicata*, of fraud, corruption or of any other offense committed during the procurement process or performance of an AFD-financed contract;
  - 2.3 Being listed for financial sanctions by the United Nations, the European Union and/or France for the purposes of fight-against-terrorist financing or threat to international peace and security;
  - 2.4 Having been subject within the past five years to a contract termination fully settled against us for significant or persistent failure to comply with our contractual obligations during contract performance, unless this termination was challenged and dispute resolution is still pending or has not confirmed a full settlement against us;
  - 2.5 Not having fulfilled our fiscal obligations regarding payments of taxes in accordance with the legal provisions of either the country where we are constituted or the Contracting Authority's country;
  - 2.6 Being subject to an exclusion decision of the World Bank and being listed on the website <http://www.worldbank.org/debarr> (in the event of such exclusion, you may attach to this Statement of Integrity supporting information showing that this exclusion is not relevant in the context of this Contract);
  - 2.7 Having created false documents or committed misrepresentation in documentation requested by the Contracting Authority as part of the

procurement process of this Contract.

3. We hereby certify that neither we, nor any of the members of our joint venture or any of our suppliers, contractors, subcontractors, consultants or subconsultants are in any of the following situations of conflict of interest:
  - 3.1 Being an affiliate controlled by the Contracting Authority or a shareholder controlling the Contracting Authority, unless the stemming conflict of interest has been brought to the attention of AFD and resolved to its satisfaction;
  - 3.2 Having a business or family relationship with a Contracting Authority's staff involved in the procurement process or the supervision of the resulting Contract, unless the stemming conflict of interest has been brought to the attention of AFD and resolved to its satisfaction;
  - 3.3 Being controlled by or controlling another bidder or consultant, or being under common control with another bidder or consultant, or receiving from or granting subsidies directly or indirectly to another bidder or consultant, having the same legal representative as another bidder or consultant, maintaining direct or indirect contacts with another bidder or consultant which allows us to have or give access to information contained in the respective applications, bids or proposals, influencing them or influencing decisions of the Contracting Authority;
  - 3.4 Being engaged in a consulting services activity, which, by its nature, may be in conflict with the assignments that we would carry out for the Contracting Authority;
  - 3.5 In the case of procurement of goods, works or plants:
    - a) Having prepared or having been associated with a consultant who prepared specifications, drawings, calculations and other documentation to be used in the procurement process of this Contract;
    - b) Having been recruited (or being proposed to be recruited) ourselves or any of our affiliates, to carry out works supervision or inspection for this Contract.
4. If we are a state-owned entity, and to compete in a procurement process, we certify that we have legal and financial autonomy and that we operate under commercial laws and regulations.
5. We undertake to bring to the attention of the Contracting Authority, which will inform AFD, any change in situation with regard to points 2 to 4 here above.
6. In the context of the procurement process and performance of the corresponding contract:
  - 6.1 We have not and we will not engage in any dishonest conduct (act or omission) deliberately indented to deceive others, to intentionally conceal items, to violate or vitiate someone's consent, to make them circumvent legal or regulatory requirements and/or to violate their internal rules in order to obtain illegitimate

- profit;
- 6.2 We have not and we will not engage in any dishonest conduct (act or omission) contrary to our legal or regulatory obligations or our internal rules in order to obtain illegitimate profit;
- 6.3 We have not promised, offered or given and we will not promise, offer or give, directly or indirectly to (i) any Person who holds a legislative, executive, administrative or judicial mandate within the State of the Contracting Authority regardless of whether that Person was nominated or elected, regardless of the permanent or temporary, paid or unpaid nature of the position and regardless of the hierarchical level the Person occupies, (ii) any other Person who performs a public function, including for a State institution or a State-owned company, or who provides a public service, or (iii) any other person defined as a Public Officer by the national laws of the Contracting Authority's country, an undue advantage of any kind, for himself or for another Person or entity, for such Public Officer to act or refrain from acting in his official capacity;
- 6.4 We have not promised, offered or given and we will not promise, offer or give, directly or indirectly to any Person who occupies an executive position in a private sector entity or works for such an entity, regardless of the nature of his/her capacity, any undue advantage of any kind, for himself or another Person or entity for such Person to perform or refrain from performing any act in breach of its legal, contractual or professional obligations;
- 6.5 We have not and we will not engage in any practice likely to influence the contract award process to the detriment of the Contracting Authority and, in particular, in any anti-competitive practice having for object or for effect to prevent, restrict or distort competition, namely by limiting access to the market or the free exercise of competition by other undertakings;
- 6.6 Neither we nor any of the members of our joint venture or any of our suppliers, contractors, subcontractors, consultants or subconsultants shall acquire or supply any equipment nor operate in any sectors under an embargo of the United Nations, the European Union or France;
- 6.7 We commit ourselves to comply with and ensure that all of our suppliers, contractors, subcontractors, consultants or subconsultants comply with international environmental and labour standards, consistent with laws and regulations applicable in the country of implementation of the Contract, including the fundamental conventions of the International Labour Organisation (ILO) and international environmental treaties. Moreover, we shall implement environmental and social risks mitigation measures when specified in the environmental and social commitment plan (ESCP) provided by the Contracting Authority.
7. We, as well as members of our joint venture and our suppliers, contractors, subcontractors, consultants or subconsultants authorise AFD to inspect accounts, records and other documents relating to the procurement process and performance of the contract and to have them audited by auditors appointed by AFD.

Name: \_\_\_\_\_

In the capacity of: \_\_\_\_\_

Signature: \_\_\_\_\_

Dated: \_\_\_\_\_

**Attachment 1: Creative Brief**

<b>PROJECT</b>
<b>CEPF Combined Annual/Impact Report</b> (expected: 100 pages including cover)
<b>PURPOSE   <i>why?</i></b>
<p>Share the impact CEPF grantees have made on biodiversity conservation and other “pillars” of the CEPF program from the start of CEPF grantmaking in 2001 through the end of the last fiscal year (June 30, 2021).</p> <p>This year’s report will combine what have previously been two separate reports: Our Annual Report, which is primarily a snapshot of a fiscal year, and our annual Impact Report, which reports results data from inception of the fund in 2000 through the end of the most recent fiscal year.</p>
<b>OPPORTUNITY   <i>ultimate impact?</i></b>
By making the results of CEPF’s grants clear, both from an annual perspective and by sharing impact data from inception of the fund, we can reinforce positive relationships with our donors, attract new donors and recognize the good work of our grantees, which may help them gain future donors and further their progress on biodiversity <b>conservation</b> .
<b>WHAT DOES THE PROJECT WORK TO ACHIEVE?</b>
Making a compelling case for the effectiveness of CEPF grantees/civil society organizations in biodiversity conservation and the importance of their work.

<b>CREATIVE / DESIGN ELEMENTS</b>
<b>WHAT ARE THE FUNDAMENTAL CREATIVE / DESIGN COMPONENTS OF THE PROJECT? I.E. STYLEGUIDES, LOOK AND FEEL, SPECIFIC PRINTED PIECES</b>
Needs to follow the CEPF brand guide
Needs to relay the global reach of CEPF (the biodiversity hotspots around the globe where we work—and therefore the diversity of species and landscapes we work on, and communities we work with)
Should visually communicate a sense of partnership, and CEPF as a key connector between big donors and conservation implementers in the biodiversity hotspots, especially grassroots groups.

The <a href="#">website</a> and most recent <a href="#">annual report</a> and <a href="#">impact report</a> are good references for look and feel.
Emphasis on use of strong photography primarily from CEPF collection. Should include a balance among species, landscape and people images.
The look should be modern and professional, but not cold.
<b>TARGET AUDIENCE</b>
<b>PROJECT TARGET</b>   <i>who are we trying to reach?</i>
Donors, potential donors, government partners (national and regional authorities), and grantees/potential grantees. So it's a pretty broad range—from the Minister of the Environment for France to a grantee working in a village in Vanuatu.
<b>BRAND TARGET</b>   <i>who does the brand speak to?</i>
Same.
<b>DESIRED REACTION</b>   <i>what actions do you wish your market to take?</i>
<ul style="list-style-type: none"> <li>• <u>Donors</u>: we'd like them to recognize the importance of biodiversity conservation and the effectiveness of CEPF to the extent that they are proud of their association and recommend it to other donors.</li> <li>• <u>Potential donors</u>: we'd like them to recognize the importance of biodiversity conservation and the effectiveness of CEPF, and become part of the donor partnership.</li> <li>• <u>Governmental partners</u>: We'd like them to readily understand what CEPF does and how working with CEPF grantees may benefit them and advance their objectives and obligations.</li> <li>• <u>Grantees</u>: we'd like them to see CEPF as a benevolent and useful partner, gain a better understanding of how CEPF works, its results, and their role.</li> </ul>
<b>ATTITUDE</b>
<b>PROJECT TONE</b>   <i>what traits are we trying convey?</i>
Collaborative, focused, strategic, effective.
<b>BRAND PERSONALITY</b>   <i>what characteristics define the brand?</i>
Collaborative, focused, powerful, hopeful, protective.

**COMPETITIVE ANALYSIS**

<b>REFERENCES</b>   <i>research, inspiration, and styles</i>
<ul style="list-style-type: none"> <li>• <a href="https://www.conservation.org/docs/default-source/publication-pdfs/2021-ci_impactreport.pdf?sfvrsn=669dce56_2">https://www.conservation.org/docs/default-source/publication-pdfs/2021-ci_impactreport.pdf?sfvrsn=669dce56_2</a></li> <li>• <a href="https://assets.ctfassets.net/tftu3vbfu92u/4Q3pX2G6Kj3IUfQ77MPyrz/f965953f46a7c497b77d782803fbb3f5/Rewild_Impact_Report_2020.pdf">https://assets.ctfassets.net/tftu3vbfu92u/4Q3pX2G6Kj3IUfQ77MPyrz/f965953f46a7c497b77d782803fbb3f5/Rewild_Impact_Report_2020.pdf</a></li> <li>• <a href="https://sqp.undp.org//innovation-library/item/download/2344_5c206df537305dd080bb2ea2a588b54f.html">https://sqp.undp.org//innovation-library/item/download/2344_5c206df537305dd080bb2ea2a588b54f.html</a></li> </ul>
<b>THE TAKEAWAY</b>   <i>what is the key idea to be remembered?</i>
<b>TAGLINE</b>   <i>prepared copy, key words, or theme</i>
<p>Tagline is: Protecting biodiversity by empowering people</p> <p>Key words: biodiversity conservation, biodiversity hotspots, civil society, nature-based solutions to climate change, capacity building.</p>
<b>GRAPHICS</b>
<p>We will need an infographic-style “executive summary similar to the one found on pages 4&amp;5 of last year’s <a href="#">Impact Report</a>. We also need a map spread similar to the one on pages 8&amp;9 in last year’s Impact Report, and several pie and bar charts similar to those found in pages 18-71 in last year’s impact report.</p>
<b>PHOTOGRAPHY</b>
<p>We typically use a lot of strong photography, mostly from our grantees, our own staff or partners. We try to present a mix of species, landscapes and people images.</p>
<b>WEB</b>
<p>We will need a low-res PDF for use on the website.</p>
<b>BUDGET</b>
<p>Estimated \$14,000-\$15,000</p>