REQUEST FOR PROPOSALS

<table>
<thead>
<tr>
<th>Procurement Number:</th>
<th>CENTER2023TECHDEM4o</th>
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<tbody>
<tr>
<td>Open Date:</td>
<td>July 20, 2023</td>
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<tr>
<td>Questions Deadline:</td>
<td>July 28, 2023</td>
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<td>Closing Deadline:</td>
<td>August 5, 2023</td>
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<tr>
<td>Geographical Area Restrictions:</td>
<td>NA</td>
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<tr>
<td>Point of Contact:</td>
<td>Amanda Zink, <a href="mailto:azink@iri.org">azink@iri.org</a></td>
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Background

The International Republican Institute (IRI) is a nonprofit, nonpartisan, organization dedicated to advancing freedom and democracy worldwide. Since 1983, IRI has worked to develop democratic institutions and ideals, carrying out a variety of international programs to promote freedom, self-government and the rule of law worldwide. IRI provides technical assistance in the areas of political party strengthening, developing civic institutions and open elections, promoting democratic governance and advancing the rule of law.

To increase civil society and elected decision makers’ understanding of and capacity to prepare for current and potential impacts of generative artificial intelligence (AI) on democratic norms and institutions, the Institute will form a working group that consists of AI experts, as well as democratic actors globally, such as civil society, digital rights activists, civic/government technologists, elected decision makers, and other underrepresented groups. The working group will convene to discuss and share research and knowledge, release a white paper that will take a global focus on generative AI, and hold external briefings and consults with civil society and government stakeholders globally to increase their understanding of the complexities of AI and hear more from them about how they see generative AI affecting their work going forward, including potential recommendations to make sure that AI is used safely and for the benefit of democracies.

Period of Performance
September 2023 to June 2024.

Statement of Work

The contractor will support IRI’s Technology and Democracy Practice’s program related to emerging technologies and generative AI, serving as the lead facilitator, moderator, and consultant to manage, prepare for and facilitate generative AI working groups discussions and to assist in drafting a resulting white paper on the impacts of AI on democracies around the world. The scope of work shall include:

A nonprofit organization dedicated to advancing democracy worldwide
Serve as the lead facilitator and/or moderator for IRI’s generative AI working group, facilitating discussion amongst working group members in approximately 6-8 working group sessions over the course of the contract. This includes developing a unique set of guiding questions and an agenda to facilitate each of the planned 6-8 working group session discussions, and coordinating with IRI to manage logistics such as scheduling and identification of speakers for each session. IRI will be responsible for selecting working group members.

Coordinate with IRI in identifying relevant speakers for each working group session including conducting outreach to speakers and collaborating with the speakers on an agenda, talking points, and facilitator questions.

Participate in working calls with IRI’s Technology and Democracy Practice to prepare, plan and synthesize outputs from each working group session.

Coordinate with IRI in drafting an outline and/or sections of a white paper synthesizing key lessons learned and recommendations, which will be a product of the working group discussions.

Contractor must have at least one previous project requiring moderating or facilitating group discussions, including managing large and diverse discussion groups, developing agendas and creating guiding questions on the majority of the following topics, but not limited to:

- Regulation of generative AI, including awareness of diverse models of regulation
- Impacts of generative AI on marginalized groups
- Opportunities for generative AI to empower and improve democratic governance
- Transparency of the development of generative AI
- Misuse of generative AI by malevolent actors, including information manipulation, surveillance, censorship, etc.
- Data privacy and generative AI, including data used in the training of AI systems
- Existing harms created by generative AI, especially harms to democratic governance
- Laws or frameworks that can create guardrails for the use of generative AI
- Potential futures of generative AI in the near term

Technical Proposals

All proposals submitted to IRI must include:

1. Description of past experience, including how it is relevant to the stated scope of work, relevant expertise on artificial intelligence, and stated moderation approaches to demonstrate how the individual or organization can successfully complete and achieve the SOW.

2. Examples of past experience, including descriptions of past generative AI topics applicant has worked on as well as descriptions of previous experience working on diverse international contexts, specifically in the global south, as demonstrated by summaries of at least two previous projects with work focused in or on international contexts outside of the U.S.
3. The name, address, and telephone and facsimile numbers of the Bidder (and electronic address if available). If the Bidder is a firm, name(s) should be provided for individuals authorized to conduct business on behalf of the firm.

4. Bidders may provide a list of up to two references who can speak to past experience and knowledge on moderating and facilitating experience, knowledge and expertise on AI, and to at least one year of work on international contexts.

5. If the Bidder is a U.S. organization/resident, or a foreign organization/resident which has income effectively connected with the conduct of activities in the U.S. or has an office or a place of business or a fiscal paying agent in the U.S., the information submitted must contain Bidder’s Taxpayer Identification Number.

6. Contact Information and resume/CV for all key personnel.

7. Copy of legal documentation (for organizations) or passport or other national identification for individuals.

8. Proposals will not exceed 5 pages (not including cover page). Times New Roman font, font size 12

9. Proposals submitted by individuals must contain the attached Expert Service Rate Form and a CV/resume.

Eligibility:

- At least one previous project requiring moderating or facilitating group discussions, including managing large and diverse discussion groups
- At least one year of experience working on international contexts, specifically in the global south
- At least one year of experience related to artificial intelligence, including knowledge of generative AI.
- Professional fluency in English

Price Proposals
Bidders must propose a firm-fixed Unit Price for each of the deliverables identified below and in the format of the table below. The Bidder’s pricing must be valid for at least 60 (sixty) calendar days after the due date for proposal submission. The proposed Unit Price should be fixed and inclusive of all costs to perform, including inspection services, transportation, taxes, import duties (if any), and other levies. To the extent that a Bidder proposed to include any pricing not reflected in the table below, such pricing must be fully described in the proposal. Proposals must be submitted in USD, payments under any resulting contract will be made in this currency.

<table>
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<tr>
<th>Unit/Deliverable</th>
<th>Unit Price</th>
<th>Number of Units</th>
<th>Total</th>
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<tr>
<td>Facilitation of at least six working group discussion sessions, including the creation of a unique agenda and set of guiding questions (at least five unique questions per session) and a set list</td>
<td>6</td>
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of identified relevant speakers for each session

| A synthesized set of notes from each working group session, with each including a summary of key learnings from each session, a total of at least six sets of notes | 6 |
| An outline to guide the drafting and development of the white paper | 1 |
| Draft language for one section of the white paper | 1 |

**Evaluation and Award Process**

1. IRI may contact any Bidder for clarification or additional information, but Bidders are advised that IRI intends to evaluate the offers based on the written proposals, without discussions, and reserves the right to make decisions based solely on the information provided with the initial proposals. IRI may but is not obligated to conduct additional negotiations with the most highly rated Bidders prior to award of a contract, and may at its sole discretion elect to issue contracts to one or more Bidders.

2. Mathematical errors will be corrected in the following manner: If a discrepancy exists between the total price proposed and the total price resulting from multiplying the unit price by the corresponding amounts, then the unit price will prevail and the total price will be corrected. If there is a discrepancy between the numbers written out in words and the amounts in numbers, then the amount expressed in words will prevail. If the Bidder does not accept the correction, the offer will be rejected.

3. IRI may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or sub-line items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if IRI determines that the lack of balance poses an unacceptable risk.

4. IRI will conduct a source selection based as follows:

   **Best Value**

IRI intends to make an award to the responsible Bidder based on the following evaluation factors:

   a) **Technical evaluation, (including technical capabilities, proposed technical approach, and personnel qualifications) - 40 percent**

   - **Moderation and facilitation capabilities and experience**  
     - **One year of experience of working on and building knowledge of artificial intelligence**  
     - **Knowledge of and/or experience working in global contexts, particularly in the global south**
b) **Past performance and experience in performing similar projects – 30 percent**
- Previous experience moderating group discussions 15
- Previous experience drafting or supporting research papers 15

c) **Price – 30 percent**

IRI intends to evaluate Bidders’ proposals in accordance with these factors and make an award to the responsible Bidder whose proposal is most advantageous to the program.

5. If a cost realism analysis is performed, cost realism may be considered in evaluating performance or price.

**Submission Instructions**
Bids must be submitted via email to Amanda Zink, at azink@iri.org with the subject line “CENTER2023TECHDEM4o” by the deadline listed above.

**RFP Terms and Conditions**
1. Prospective Bidders are requested to review clauses incorporated by reference in the section “Notice Listing Contract Clauses Incorporated by Reference”.
2. IRI may reject any or all proposals if such is within IRI’s interest.
3. Proof of costs incurred, such as but not limited to receipts, pictures and financial documents, may be requested during and for up to three years after the end of the contract period.
4. The Bidder’s initial proposal should contain the Bidder’s best offer.
5. Payment will be made upon receipt of invoices and deliverables/services.
6. Discussions with Bidders following the receipt of a proposal do not constitute a rejection or counteroffer by IRI.
7. IRI will hold all submissions as confidential and submissions shall not be disclosed to third parties. IRI reserves the right to share proposals internally, across divisions, for the purposes of evaluating the proposals.
8. For any currency conversion, the exchange rate to US Dollars listed on oanda.com on the closing date of this solicitation shall be used.
9. Every contract will contain provisions governing termination for cause and termination for convenience.
10. By submitting a proposal, offeror agrees to comply with all terms, conditions, and provisions included in the solicitation and agreement to the services identified above, and will specifically identify any disagreement with or exceptions to the terms, conditions, and provisions.
11. Offerors confirm that the prices in the proposal/proposal/application/quote have been arrived at independently, without any consultation, communication, or agreement with any other Bidder or competitor for the purpose of restricting competition.
12. By applying to this RFP, applicant is certifying that if it is awarded a contract, none of funds payable under the resulting contract will be used to (1) procure or obtain, extend or renew a contract to procure or obtain; (2) enter into a contract (or extend or renew a contract) to procure; or (3) obtain the equipment, services, or systems that uses covered telecommunications equipment or services as a
substantial or essential component of any system, or as critical technology as part of any system in compliance with the National Defense Authorization Act. Covered telecommunications equipment and services mean any of the following:

i. Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).

ii. For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).

iii. Telecommunications or video surveillance services provided by such entities or using such equipment.

iv. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country. *(2 CFR 200.216)*

13. Bidders agree to disclose as part of the proposal submission:

   o Any close, familial, or financial relationships with IRI staff and agents. For example, the Bidder must disclose if a Bidder’s mother conducts volunteer trainings for IRI.

   o Any family or financial relationship with other Bidders submitting proposals. For example, if the Bidder’s father owns a company that is submitting another proposal, the Bidder must state this.

   o Any other action that might be interpreted as potential conflict of interest.

**Notice Listing Contract Clauses Incorporated by Reference**

IRI is required to make the contractor subject to certain flowdown clauses of the prime award. This awarded contract will incorporate one or more clauses by reference, with the same force and effect as if they were given in full text. Where “flow-down” to the contractor is applicable, references to “USAID/Department of State” shall be interpreted to mean “IRI”, “Recipient” to mean “Contractor”, and “Subrecipient” to mean “lower-tier subcontractor.” Included by reference are the applicable provisions contained in Appendix II to 2 CFR Part 200 and USAID Standard Provisions for Non-US Non-governmental Organizations/US Department of State Standard Terms and Conditions.

**IRI Obligations**

Issuance of this RFP does not constitute an award commitment on the part of IRI, nor does it commit IRI to pay for costs incurred in the preparation and submission of a proposal or quotation.

**Required Certifications**

The following certificates need to be signed by all Bidders. These certifications are an integral part of the quotation/proposal. Please print them off and send back to us with your proposal after signature on each certificate. They are:
• Certification regarding debarment, suspension, ineligibility and voluntary exclusion lower tier covered transactions
• Authorized Individuals
CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION LOWER TIER COVERED TRANSACTIONS

This certification implements Executive Order 12549, Debarment and Suspension and the requirements set forth in 2.C.F.R. 180, Subpart C.”

Copies of the regulations may be obtained by contacting the person to which this proposal is submitted.

1. By signing and submitting this proposal/application/quote, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal/application/quote is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
5. The prospective lower tier participant agrees by submitting this proposal/application/quote that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the IRI.
6. The prospective lower tier participant further agrees by submitting this proposal/application/quote that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion--Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 above, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a
person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature: _________________________
Date: __________________________
Name: __________________________
Title/Position: ____________________
Entity Name: _____________________
Address: _________________________
**Authorized Individuals**

The offeror/bidder/applicant represents that the following persons are authorized to negotiate on its behalf with IRI and to bind the recipient in connection with this procurement:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Telephone</th>
<th>Email</th>
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Signature: ______________________
Date: ______________________
Name: ______________________
Title/Position: ______________________
Entity Name: ______________________
**EXPERT RATE INFORMATION**

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<tr>
<th>Name (Last, First, Middle)</th>
<th>Proposed Rate:</th>
<th>Daily</th>
<th>Hourly</th>
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</table>

Rates should be given for the last three (3) years. If employment history/salary information is applicable, list salaries separate for each year. If expert services is applicable, indicate the type of rate daily/hourly.

**EMPLOYMENT HISTORY - SALARY**

<table>
<thead>
<tr>
<th>POSITION TITLE</th>
<th>EMPLOYER’S NAME AND ADDRESS</th>
<th>Employment Period (M/D/Y)</th>
<th>Annual Salary¹</th>
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<tbody>
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<td>From</td>
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**SPECIFIC EXPERT SERVICES**

<table>
<thead>
<tr>
<th>SERVICES PERFORMED/TITLE</th>
<th>CLIENTS NAME AND ADDRESS</th>
<th>Service Period (M/D/Y)</th>
<th>Units at Rate</th>
<th>Daily/Hourly Rate² in U.S. Dollars</th>
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<td>From</td>
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<td>Rate</td>
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**CERTIFICATION:** To the best of my knowledge, the above facts as stated are true and correct.

Signature __________________________ Date __________________________

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¹ Basic periodic payment for services rendered. Exclude bonuses, profit-sharing arrangements, commissions, consultant fees extra or overtime work payments, overseas differential or quarters, cost of living or dependent education allowances.

² A form of management fee whereby the client pays a set fee for providing professional services. Exclude cost reimbursements, bonuses, overtime work payments, overseas differential or quarters, cost of living, and any other allowances.