

REQUEST FOR PROPOSALS

Tarantula Identification Guide

for the project

Supporting Sustainable Trade of CITES Species



Commission for Environmental Cooperation

2017

I. Overview

The Commission for Environmental Cooperation (CEC) is requesting proposals from prospective consultants related to the development of an identification guide (ID guide) for 16 tarantula species identified as priority in the CEC's "[Sustainable Trade in Tarantulas: Action Plan for North America](#)". Specifically, the consultant is expected to compile all necessary information and to design and develop a guide that should allow its availability in printed and digital media.

The work described in this request for proposals (RFP) is part of the project entitled *Supporting Sustainable Trade of CITES Species* from the 2017-2018 Operational Plan. For a complete description of the project, including tasks and related budget, please visit the CEC website at: <http://www.cec.org/our-work/projects/supporting-sustainable-trade-cites-species>.

The Commission for Environmental Cooperation (CEC) was established by the governments of Canada, Mexico and the United States through the North American Agreement on Environmental Cooperation, the environmental side agreement to NAFTA. An intergovernmental organization, the CEC brings together citizens and experts from governments, nongovernmental organizations, academia and the business sector to seek solutions to protect North America's shared environment, while supporting sustainable economic development. Find out more at: www.cec.org.

II. Terms of Reference

A. Overview and Scope

Tarantula species are difficult to identify and only few hobbyists, breeders or even academics would be experienced enough to identify each species on sight. However, with some basic training and the use of a suitable guide to identification, border enforcement officials may be able to identify sub-adult and adult specimens of "priority tarantula species" that are the specimens most likely to be sourced from the wild. To ensure that trade is based on legal and sustainable harvest, Canada, Mexico and the United States, through the CEC, support the development and distribution of a tarantula identification guide to fulfilling environmental law enforcement needs. The use of the identification guide compiled in this project will allow border enforcement officers to identify sub-adult and adult tarantula specimens from sixteen "priority tarantula species" (listed in Annex A), comprising one from the genus *Aphonopelma* and 15 from the genus *Brachypelma*.

Species of the 16 priority tarantulas vary in their adult coloration and markings. For example, some species have dark-colored legs, while others have legs that display distinct bands of colors (Hijmensen 2012). These morphological differences are used to identify adult specimens. The differences between species can, however, be subtle and vary between specimens of the same species. Identification of those species that do not exhibit bright colors or bold patterns may be more difficult.

A good, up-to-date reference to *Brachypelma* identification is not currently available [see fuller discussion in CEC Action Plan (see above link)]. In 1995, the USFWS sponsored the production of a series of *Brachypelma* identification sheets for inclusion in the *CITES Identification Manual*—a publication that was distributed by the CITES Secretariat (CITES 1995; Kirkby et al. 1995). In 2011, the Secretariat discontinued the printed version of the identification manual and

moved to an online “Wiki” version (CITES 2011).¹ As of July 2016, the identification sheets for *Brachypelma* had not been uploaded to the Secretariat’s CITES Wiki, and the printed version was no longer available (CITES 2016b). In any case, the information in those pages would no longer be considered taxonomically current or adequate for law enforcement purposes.

Most *Brachypelma* tarantulas in trade are spiderlings, meaning that they are in an early instar developmental stage.² Spiderlings are typically impossible to identify, even to the genus level, until they are at least one year old. However, the red-legged *Brachypelma* species start to show their color pattern when they are 2.5–5.0 centimeters in leg span. These are the species that are the most sought-after in trade, and the markings exhibited by specimens larger than 2.5 centimeters in leg span could be useful for verifying the species listed on a CITES permit.

B. Description of Services

The consultant shall coordinate with the CEC’s designated contacts to accomplish the work described below.

1. Compile all necessary information required for the identification guide, which includes contacting identified experts and following suggestions of the CEC–CITES project Steering Committee.
2. Design and develop the identification guide, including acquisition of appropriate images and/or pictures and layout all contents, for digital or printed purposes.
3. Present draft identification guide during the proposed Tarantula Trilateral Trade and Enforcement Workshop (27 February–2 March 2018) in Mexico to receive feedback from experts and enforcement officers.
4. Preferentially, produce material in both English and Spanish.

Deliverables

1. Draft tarantula identification guide including:
 - a. A summary of compiled information
 - b. Outlined graphical design and layout for printed and digital media
 - c. Proposed images
 - d. References

In addition, the consultant should consider the following:

- a. Guide should focus on the sixteen priority tarantula species (listed in Annex A), be scientifically accurate and up-to-date, amply illustrated with photographs or images.
- b. Target audience shall be assumed non-experts, or enforcement officers with little or no prior knowledge of tarantula morphology and taxonomy.
- c. A flexible structure to allow for variations in text lengths for three languages (English, French and Spanish) is required.
- d. Guide format should allow its availability in printed and digital media or that could lead to the development of a pictorial identification smartphone “app”.

¹ A “Wiki” is a website that is designed to allow users to contribute and edit its content (Merriam-Webster 2016).

² After the early instar developmental stages, a spider molts to the “antepenultimate” instar stage (two molts from sexual maturity), then the “penultimate” instar stage (one molt from sexual maturity), and lastly the “ultimate” instar stage (sexual maturity). Female tarantulas live longer than males and can molt several more times into “post-ultimate” life stages (West, pers. obs.).

The consultant should use as reference the CITES ID guides developed on the genus *Abronia* <<https://cites.org/sites/default/files/eng/com/ac/29/E-AC29-19-R1.pdf>> and *Agalychnis* <<http://www.biodiversidad.gob.mx/planeta/cites/guiaRanas.html>>.

2. Attendance at the proposed Tarantula Trinational Trade and Enforcement Workshop Ajjic, Jalisco, Mexico (27 February–2 March 2018), and presentation of draft ID guide for feedback.
3. Final identification guide that includes:
 - a. Steering Committee and experts feedback
 - a. Optimized graphical elements in .png, .jpeg or other digital and printed formats

C. Periodic Reporting Requirements

Throughout the project, the consultant will work in close collaboration with the CEC, the project's Steering Committee, and experts to gather information that will support delivery of the work. Such experts will include CITES scientific authorities, law enforcement officers and tarantula experts. The consultant may consult directly with government officials and other experts, as needed. However, the consultant shall report only to, and receive direction only from, the CEC designated contact.

The CEC Secretariat will forward draft deliverables to the project's Steering Committee and other experts, for their review and comment. The CEC Secretariat will arrange teleconferences with the consultant, the CEC designated staff, and other experts on an as-needed basis. The goal of these teleconferences will be to present the products and assess progress on the project.

The consultant will work in his or her own offices.

A proposed schedule and list of deliverables is shown below. However, in their proposal, prospective consultants are encouraged to suggest an alternative schedule and list of deliverables. Note that all work within the contract must be completed by 27 April 2018.

16 February 2018	Submission of draft identification guide (as described under Deliverables point 1)
27 February- 2 March 2018	Attendance to workshop (as described under Deliverables point 2)
By 9 April 2018	Submission of final identification guide (as described under Deliverables point 3)

D. Quality of Deliverables

The consultant is responsible for providing deliverables of **publishable quality** (i.e., copy-edited prior to submission) in Spanish and/or English and, when applicable, for the technical editing of the materials. The consultant will submit to the CEC Secretariat all written material adhering to the precepts of the [Guidelines for CEC Documents and Information Products](#), as supplemented by the CEC's Spanish Style Guide <<http://www.cec.org/es/acerca-de-la-cca/posibilidades-empleo/documentos-de-referencia>> or English Style Guide

http://www.cec.org/sites/default/files/documents/opportunities/18873_style-guide.pdf.

Preliminary and final versions of the guide shall be delivered as InDesign files, with accompanying PDFs, document fonts and link files. Supporting documents for tables, figures and maps will be submitted in their original file format (e.g., Excel or ArcGIS). Note that all amounts shall be presented in metric units. The CEC Secretariat will be responsible, when applicable, for translation, printing, publication and distribution of products from this activity.

Upon delivery by the consultant of a final version of the report or other written materials under the project, the CEC reserves the right to a 15-business day period to review the document(s), notify the consultant of any potential issues or errors, and return the document(s) to the consultant for appropriate corrections, at no extra cost. In all cases, contract payments will be withheld if products submitted to the CEC fail to fulfill the quality and formatting requirements specified above. In the event that the consultant neglects to make the required corrections or if, following corrections, a deliverable remains unsatisfactory, the document shall be edited or revised by a third party designated by the Secretariat, the cost of which shall be deducted from the consultant's fees at a rate of C\$60 per hour.

E. Plagiarism

Plagiarism is the act of conveying someone else's original expression or creative ideas as one's own and can be a violation of copyright law. Neither intentional nor unintentional plagiarism is acceptable to the CEC. The consultant must follow good scholarly methodology in preparing reports and deliverables under the contract, including systematic referencing in footnotes or in-sentence references, for any secondary sources, quotations, data, etc., that do not originate with the author. Sources for tables and figures reproduced from other literature must be given in a "Source" attribution immediately below the table or figure. Failure to properly reference the source of such borrowed material constitutes plagiarism and will be considered a breach of contract. For further information, see [Guidelines for CEC Documents and Information Products](#). In addition, for every written deliverable submitted, the Consultant must use iThenticate software, or an equivalent software approved by the Commission, to validate the written product in question and must forward the plagiarism review results to the CEC at the time of document submission. Contract payments will be retained if products do not fulfil these requirements.

III. Requirements and Proposal Evaluation

A. Mandatory Requirements

To be eligible for further consideration, all consultants must fulfill the following basic requirements.

1. In-country Ability

The consultant, as well as all their personnel and subconsultants, must reside and be authorized to work legally in Canada, Mexico or the United States of America. If travel is required, the consultant must possess valid documentation to travel within these countries.

2. Key Personnel

For the purposes of this RFP, the term "consultant" may refer to either a group or company or a single individual.

If a proposal is submitted by a consortium of individuals or institutions, a “lead” consultant should be designated to take responsibility for ensuring overall coordination, the coherence of activity outputs, and the integration of information and ideas.

3. Qualifications Required

The consultant must possess:

- Competence and experience in conducting compilation of information, and excellent writing skills;
- Experience working in the development of graphical products for printed and digital media;
- Demonstrated knowledge on tarantula taxonomy and identification.

4. Proposal Submission

It is the intention of the CEC Secretariat to include the **Terms of Reference (Section II)** of this document) in the contract negotiated with the successful applicant. Therefore, prospective consultants should refer to these for more detailed information on the project and the services to be provided. Prospective consultants are requested not to reiterate the Terms of Reference in their submissions, but are invited to suggest modifications to enhance the proposal.

Research proposals should include but not be limited to the following elements:

- A brief statement of interest and intent. This statement should be based upon and serve to demonstrate the consultant’s experience and subject knowledge. The statement should address desired results; guidelines (parameters within which results are to be accomplished); resources (human, financial, technical, or organizational support available to help accomplish the results); and other aspects deemed applicable by the consultant. The purpose of this statement is to demonstrate not only the consultant’s general and specific familiarity with the subject area, but also to highlight writing skills;
- A short overview stating the ID guide proposed ideas including any graphical elements or images that can support the application;
- Suggested modifications to the Terms of Reference, and the reasons for such modifications;
- Resumes of the key personnel involved in the project;
- Detailed cost breakdown, including number of person/days of key and other personnel, direct and indirect costs, travel costs and applicable taxes;
- Two samples of previous work;
- Contact information for three references.

B. Other Information to be Provided

Potential consultants are encouraged to submit any additional information that they believe will assist the CEC Secretariat in the evaluation of their proposal. However, the proposal should not exceed six (6) pages, exclusive of applicant resumes, samples of previous work or corporate brochures.

C. Type of Contract to be Used for These Services

The CEC Secretariat intends to use its standard time-based contract for these services. A sample is available upon request.

All work within the contract must be completed by 27 April 2018.

D. Selection Procedure

The consultant deemed best qualified will be selected on the basis of a competitive process, in accordance with sections 2.5-2.7 of the [CEC Consultant Services Procurement Manual](#).

Proposals that the CEC Secretariat determines to be complete will be evaluated according to the procedure described below.

Each complete proposal that is submitted will be evaluated by the CEC Secretariat according to the following criteria, with a point rating assigned for each:

Evaluation Criteria	Maximum Point Rating
Understanding of project requirements, adequacy of work plan	20
Suitability of the proposed design to address guide goals and expectations	20
Consultant's experience and qualifications and competency of key personnel	40
Consultant's ability to compile and summarize information	10
Adequacy of budget	10
<i>Total</i>	100

A minimum score of 80 will be required for the prospective consultant's proposal to be eligible for further consideration. Cost efficiency will be taken into account in the evaluation.

Proposals in response to this request will be evaluated by the CEC designated staff and technical reviewers, who will form an Evaluation Committee. Each member of the Evaluation Committee will receive a copy of the proposals and will be asked to rate each proposal using the evaluation criteria and its maximum point ratings given above.

The CEC designated staff will arrange for a conference call/meeting among the members of the Evaluation Committee to discuss the ratings, arrive at final scores, and, subsequently, a ranking of all proposals. The strengths and weaknesses of each proposal, in terms of the evaluation criteria, will be noted and summarized. Once the selection has been made, each prospective consultant will be provided with their score—if requested—along with their comparative ranking. However, neither the evaluations nor the scores of other bidders will be provided.

E. Estimated Level of Resources Required

The envelope available is C\$50,000 (fifty thousand Canadian dollars), including professional fees and expenses and inclusive of all costs associated with attending the proposed Tarantula Trilateral Trade and Enforcement Workshop in Ajijic, Jalisco, Mexico (27 February- 2 March 2018). Reimbursable expenses are detailed in the CEC standard contract, available upon request; in addition, the cost of using iThenticate or other plagiarism detection software (US\$50) should also be considered.

Note that the CEC accepts that overhead be charged for administration and other indirect costs up to 15% of the total value of the contract.

If the proposal were presented by a consultant established in Mexico, the applicable value-added tax will be 0%, in accordance with Article 29, section IV, paragraph a) of Mexico's VAT Act, as these are technical services that were engaged from abroad.

F. Basis of Payment Required

Payment shall be made only for *bona fide* consultant fees and legitimate expenses incurred in accordance with the contract for professional services, and only upon receipt and documented acceptance by the Secretariat of statement(s) of account/invoice(s) from the consultant. Settlement of invoices that are acceptable for payment will normally be made 30 days from the date of receipt by the Commission.

G. Financial and Other Confidential Information [optional]

For this proposal, the CEC Secretariat will not require the submission of any confidential information nor will the CEC Secretariat require information regarding insurance, bonding financial status, or company ownership.

H. Conflict of Interest

"Conflict of interest" means, but is not limited to, a situation where a consultant's personal interest is sufficiently connected with professional duties under the contract, such that it results in a reasonable apprehension that said personal interest may influence the exercise of professional responsibilities under the contract. For example, a direct conflict of interest exists when the consultant is also a CEC government official, or is related to or closely affiliated with a CEC government official, CEC staff member or third party involved with the performance of the services.

The consultant will inform the CEC Secretariat of any circumstance that existed prior to the execution of this contract, or that could manifest during the performance of this contract, which could constitute a conflict of interest. The consultant will complete and sign, on behalf of all his or her personnel, the attached *Declaration of Acceptance and Impartiality and Independence* (see Annex). The Consultant will also take note of the [CEC Consultant Services Procurement Manual](#).

I. Deadlines for Proposal Submission and Decision

The proposal, including all relevant attachments, must be received by the CEC Secretariat offices by **17:00 EST on 12 January 2018**. Proposals submitted after this deadline will not be considered.

Proposals must be submitted via e-mail to gofarrill@cec.org. Proposal format may be in Microsoft Word or Adobe PDF format. Once the proposal has been submitted electronically, the CEC will confirm receipt within three business days. If receipt is not confirmed by e-mail within this time, **applicants must contact the CEC**. The contact person is:

Georgina O'Farrill
Project Lead – Ecosystems and Green Growth Units
Commission for Environmental Cooperation
393, rue St-Jacques Ouest, bureau 200
Montreal, QC, Canada H2Y 1N9
Tel: 514-350-4336; Fax: 514-350-4314

The CEC Secretariat intends to select the consultant and notify the applicants within a reasonable period of time following the proposal submission deadline.

Annex A: 16 priority tarantula species

Aphonopelma pallidum (F.O. Pickard-Cambridge, 1897)
Brachypelma albiceps (Pocock, 1903)
Brachypelma annitha (Tesmoingt, Cleton & Verdez, 1997)
Brachypelma auratum (Schmidt, 1992)
Brachypelma aureiceps (Chamberlin, 1917)
Brachypelma baumgarteni (Smith, 1993)
Brachypelma boehmei (Schmidt & Klaas, 1993)
Brachypelma emilia (White, 1856)
Brachypelma epicureanum (Chamberlin, 1925)
Brachypelma hamorii (Tesmoingt, Cleton & Verdez, 1997)
Brachypelma kahlenbergi (Rudloff, 2008)
Brachypelma klaasi (Schmidt & Krause, 1994)
Brachypelma schroederi (Rudloff, 2003)
Brachypelma smithi (F.O. Pickard-Cambridge, 1897)
Brachypelma vagans (Ausserer, 1875)
Brachypelma verdezi (Schmidt, 2003)

Annex B: References

1. CEC. 2017. [Action Plan for North America Sustainable Trade in Tarantulas](http://www3.cec.org/islandora/en/item/11697-sustainable-trade-in-tarantulas-action-plan-north-america-en.pdf). <<http://www3.cec.org/islandora/en/item/11697-sustainable-trade-in-tarantulas-action-plan-north-america-en.pdf>>.
2. CITES (Convention on International Trade in Endangered Species of Wild Fauna and Flora). 1995. *CITES Identification Manual*. Geneva: CITES Secretariat. Pp. A-977.005.000.001 to A-977.005.001.009.
3. ———. 2011. Notification to the Parties: CITES Wiki Identification Manual. CITES Secretariat, Geneva.
4. ———. 2016b. CITES Wiki Identification Manual. CITES Secretariat, Geneva. <<http://citeswiki.unep-wcmc.org/IdentificationManual/tabid/56/language/en-US/Default.aspx>>.
5. Hijmensen, E. 2012. The genus *Brachypelma*. Netherlands. <<http://mantid.nl/tarantula/Brachypelma.html>>.
6. Kirkby, D.L., R.C. West, D.A. Hodge, and R. Wolff. 1995. *Brachypelma (Araneae, Theraphosidae): General Notes*. Washington, DC: United States Fish and Wildlife Service and the National Fish and Wildlife Foundation. 23 pp.

ANNEX D

CONSULTANT'S DECLARATION OF ACCEPTANCE AND IMPARTIALITY AND INDEPENDENCE FOR CONTRACT

I, the undersigned,

Last Name: _____ First Name: _____

ACCEPTANCE

☐

hereby declare that I accept to serve as consultant in the subject contract.

IMPARTIALITY AND INDEPENDENCE

(If you accept to serve as a consultant, please check one of the two following boxes. The choice of which box to check will be determined after you have taken into account, inter alia, whether there exists any past or present relationship, direct or indirect, with any of the Parties to the North American Agreement on Environmental Cooperation ("NAAEC") or their Commission for Environmental Cooperation ("CEC") representatives, Secretariat staff, and/or third parties involved in the performance of this contract, whether financial, professional, familial, or of another kind and whether the nature of any such relationship is such that disclosure is called for pursuant to the criteria set out below. Any doubt should be resolved in favor of disclosure.)

☐

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, CEC Secretariat staff, and third parties involved in the performance of this contract, and intend to remain so; to the best of my knowledge, there are no facts or circumstances, past or present that need be disclosed because they are likely to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest.

OR

☐

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, Secretariat staff, and/or third parties involved in the performance of this contract, and intend to remain so; **however**, I wish to call your attention to the following facts or circumstances which I hereafter disclose because they might be of such a nature as to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest. Where facts or circumstances exist that might give rise to the latter such doubts, I may set out measures I intend to take to mitigate or eliminate any doubts regarding my impartiality and independence, and/or a possible conflict of interest. (Use separate sheet and attach.)

Date: _____

Signature: _____