

**REQUEST FOR QUOTES For  
Rental Car Services  
Issued by: Counterpart International**

Issue Date : May 01, 2026  
RFQ Number: KEN/Admin/1133/013  
RFQ Name: RFQ for rental car services  
Questions due by: May 14, 2026, 5:00 PM Nairobi Local Time  
Answers due by: May 18, 2026, 5:00 PM Nairobi Local Time  
Closing Date for Responses: May 25, 2026, 5:00 PM Nairobi Local Time  
Submit to: [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org)  
Number of anticipated awards: Multiple

COUNTERPART International (hereinafter COUNTERPART) is seeking written quotes from qualified individuals, organizations and/or firms for procurement of rental car services for an international development organization as further described below. Please take the time to read and understand these sections as failure to respond fully may result in your submission being determined to be non-responsive and removed from further consideration.

Questions and quotes are due to:

COUNTERPART International USDA Food for Progress Kenya Livestock Innovation and Feed Transformation (LIFT) Program, email address [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org)  
No phone inquiries please.

**1. INTRODUCTION/BACKGROUND**

The **Food for Progress Kenya LIFT** Project is a USDA funded program implemented by Counterpart International in Kenya. The goal of the LIFT Project is to expand quality agricultural products and increase agricultural productivity in Kenya through improved feed quality, affordability, and adoption of best practices at scale. As part of project activities, the LIFT Project requires the purchase of **rental car services required for the project's operations in Kenya. The services will include field travel activities within and outside Nairobi** to carry out the LIFT Project's activities envisioned to operate in the following counties: Nairobi, Uasin Gishu, Kiambu, Nakuru, and Kajiado.

Offerors are responsible for ensuring that their offers are received by Counterpart in accordance with the instructions, terms, and conditions described in this RFQ. Failure to adhere with instructions described in this RFQ may lead to disqualification of an offer from consideration.

2. Offerors should put forward their qualifications and price quote to support COUNTERPART in a rental car service. As a result of this RFQ, COUNTERPART anticipates issuing one or multiple service contract(s).

3. **Offer Deadline and Protocol:** Offers must be received no later than 5:00PM local Nairobi time on May 25, 2026 by email sent to [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org).

Please reference the RFQ number in any response to this RFQ. Offers received after this time and date will be considered late and will be considered only at the discretion of Counterpart.

4. **Questions:** Questions regarding the technical or administrative requirements of this RFQ may be submitted no later than 5:00PM local Nairobi time on May 14, 2026 by email to [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org). Questions and requests for clarification—and the responses thereto—that Counterpart believes may be of interest to other offerors will be circulated to all RFQ recipients who have indicated an interest in bidding.

Only the written answers issued by Counterpart will be considered official and carry weight in the RFQ process and subsequent evaluation. Any verbal information received from employees of Counterpart or any other entity should not be considered as an official response to any questions regarding this RFQ.

5. **Specifications:** Section 3 contains the technical specifications of the items that may be ordered under the RFQ.

Please note that, unless otherwise indicated, stated brand names or models are for illustrative description only. An equivalent substitute, as determined by the specifications, is acceptable.

## 1. SCOPE OF WORK

COUNTERPART seeks an individual, organization or firm to provide full-time and/or part-time rental car services for the USDA-funded LIFT Project in Kenya:

- A. Available Monday to Friday for 10 hours per day at a fixed monthly rate;
- B. Available for shorter periods to be costed per kilometre (KM);
- C. For more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent) for 10 hours per day at a fixed daily rate;
- D. For travel to more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent) to be costed per KM;
- E. Offerors are also requested to provide rates for overnight stays outside Nairobi, inclusive of driver accommodation, meals, and incidental expenses.
- F. For a standby vehicle, billed only upon use (to be costed at daily rate)

Counterpart International will decide whether to go with a monthly, daily or per KM rate, or a combination of items

The LIFT project will have a mechanism to re-evaluate the monthly vehicle rental basis, based upon utilization data.

The vehicles used for transportation should be equipped with the following essential features.

*Vehicle Type:*

The service provider should provide a well-maintained, reliable, and fuel-efficient vehicle suitable for both urban and field operations under the LIFT Project.

The primary vehicle shall be a mid-size SUV or equivalent (e.g., Toyota Fortuner, or equivalent) capable of operating effectively within Nairobi as well as on inter-county routes. Given that project activities may involve travel to areas with varying road conditions, the vehicle must be suitable for occasional rough or unpaved terrain.

Where travel to more demanding terrain is required (e.g., remote field locations), the service provider may be requested to provide a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent). Any cost implications for such upgrades should be clearly indicated separately in the financial proposal.

*Regularly Serviced Vehicles:* All vehicles should be regularly serviced and maintained. This includes regular oil changes, tire checks, brake inspections, and overall mechanical inspections to ensure the vehicle is in optimal running condition and to minimize the risk of breakdowns.

*Cleanliness:* Vehicles should be kept clean and sanitized regularly to ensure a comfortable and hygienic environment for all passengers.

*Fire Extinguisher:* A fire extinguisher should be readily available in every vehicle to handle any potential fire emergencies, and driven by well-trained, professional drivers.

## **2. REQUIRED QUALIFICATIONS/ TECHNICAL SPECIFICATIONS**

The table below contains the list of services that may be ordered under the award mechanism. Offerors are requested to provide per-unit quotations containing the information below on official letterhead or official quotation format. In the event this is not possible, offerors may complete this Section 3 and submit a signed/stamped version to Counterpart.

The minimum requirements for the assigned vehicle:

- i. The vehicles should be less than 10 years
- ii. The vehicles should have valid registration documents, insurance, and mandatory inspection (if applicable)
- iii. The vehicle should have fully functional air-conditioning
- iv. The vehicle should have fully functional seat belts for all passengers and driver
- v. The vehicle should be equipped with good tires (including spare tire), jack, handle, wheel brace and tool kits. All mirrors, lights and other electrical systems must be fully functional
- vi. Working windshield wipers
- vii. Very good brakes

- viii. Jumper cables
- ix. Windows and doors intact and operable
- x. Loud horn
- xi. Fire extinguisher
- xii. First Aid Kit
- xiii. Any other required accessory and or spare parts

- During the whole contract period, the service provider will be responsible to carry out repair and maintenance of the vehicles at their own cost.
- In case of breakdown/repair/non-availability of the assigned transport, the vendor will provide Counterpart International, Kenya with an immediate replacement transport of same or better type and quality.
- The service provider agrees to provide an English and Swahili-speaking driver, with a valid driver's license and demonstrated safety record. Counterpart reserves the right to request a replacement driver at its discretion; If the primary driver assigned is not available for duty, Service provider agrees to provide a replacement English and Swahili-speaking driver at no additional cost,
- The service provider shall subscribe to and pay for comprehensive insurance coverage for the vehicle(s). This insurance should cover all liabilities. Counterpart accepts no liability under any circumstances for the vehicle or the driver and third party.
- The service provider shall take full responsibility for any damages, loss, theft, or bodily injury of the vehicles, the driver and other parties Counterpart shall not be liable for any action, omission, negligence, or misconduct of such driver, nor for any costs, expenses or claims associated with any illness, injury, death or disability of such driver performing services in connection with this Contract. Counterpart shall have no responsibility vis-à-vis the driver
- The service provider shall be fully responsible for the operation of the vehicle and ensure that the driver operates the vehicle in accordance with applicable law. The service provider shall be fully responsible for payment of salary and other benefits to its driver as required by the governing labor laws, as well as for paying any fees incurred by the driver, including but not limited to fines for traffic violations, parking charges, and any applicable toll or road user fees.
- Transportation services shall be generally available during working days from Monday to Friday for 10 hours/day. However, the transport may also be required to be used on weekend and public holidays at different times as requested.
- The service provider/driver will maintain a logbook for regular transport movement. Such logbook will include information on purpose of the use, mileage, time, date, user's signature, etc.
- Days for drivers staying in or outside Nairobi will be based on actual daily usage, also the

Company should be responsible for the drivers overnight stay, per diems etc.

- Use of the vehicle will be consistent with Counterpart International's Global Vehicle Use Policy.
- The vehicle must have the following in working order: 4 doors plus luggage area, Electric Central Locking, Electric Window Locking, Electric Windows, Air Conditioning, Power Steering, ABS Brakes, Tires and Spare Tire in Good Condition and functioning seat belts.
- Provide Vehicle equipped with functional emergency equipment in the vehicle at all times: fire extinguisher, jack, spare tire, tire iron, toolbox, first aid kit and a flashlight with batteries and necessary display of license plate.
- Provide references from other international organizations/companies for which you have worked

#### **REQUIRED DRIVER QUALIFICATIONS**

The driver(s) shall be:

- Properly trained in the operation and maintenance of the vehicle;
- Sufficiently experienced, with at least four years of experience as a driver;
  - Licensed for operating a motor vehicle, including for passenger service if available and are familiar with the Kenya road code of conduct;
  - Familiar with local routes and destinations;
  - Properly attired during hours of operation;
  - Observe at all times basic courtesy to passenger(s), fellow motorists, and road authorities;
  - In possession of no prior accident records; and
  - In possession of a mobile phone with an active number provided by the Service provider
  - Have undergone appropriate background and reference checks conducted by the Service Provider, including verification of identity, driving history, and a certificate of good conduct or equivalent clearance from relevant authorities.
- The service provider shall be responsible for the professional and technical competence of its employee and will select, for work under this Contract, reliable individuals who will perform effectively in the implementation of this Contract, respect the local customs, and conform to a high standard of moral and ethical conduct. Counterpart reserves the right to review the qualifications of the driver before the commencement of service, or at any other time during the term of this Contract but shall have no obligation to do so. At Counterpart's request, the Driver shall be replaced with another meeting the above conditions within 24 hours after receiving written notification from Counterpart.

**Detailed Specifications and Requirements/Price Schedule:**

Prospective vendor/s are requested to provide their quotations based on the table below. Prospective vendor/s can submit their quotations on their company letterhead or using the table below:

The table below contains the technical requirements of the services. Offerors are requested to provide quotations containing the information below on the official letterhead or official quotation format.

- The quotation should include all associated costs for transportation services, including local taxes, etc.

In addition, please include provision for a second standby vehicle, which will only be deployed and billed on an as-needed basis, subject to prior authorization by CI.

While the cost for the vehicle rental will be fixed on a monthly or daily basis or for a specified distance, other costs will be paid based on the actual usage and receipts as and when authorized by Counterpart:

**3. ANTICIPATED PERIOD OF PERFORMANCE**

The anticipated period of performance for this scope is approximately 24 months.

**4. PRICE OFFER**

Quotations in response to this RFQ must be priced on a fixed-price, all-inclusive basis, including delivery and all other costs. Pricing must be presented in Kenyan Shillings (KES). Offers must remain valid for not less than ninety (90) calendar days after the offer deadline. Offerors are requested to provide quotations on official letterhead or format.

In addition, offerors responding to this RFQ are requested to submit the following:

- Organizations responding to this RFQ are requested to submit a copy of their official registration or business license.
- Individuals responding to this RFQ are requested to submit a copy of their identification card.

**5. EVALUATION PROCEDURES AND CRITERIA**

The award will be made to a responsible offeror whose offer follows the RFQ instructions, meets the eligibility requirements, and is determined via a trade-off analysis to be the best value based on application of the following evaluation criteria. The relative importance of each individual criterion is indicated by the number of points below:

Evaluation Criteria	Evaluation Criteria	Maximum Points
---------------------	---------------------	----------------

Eligibility Criteria	<ul style="list-style-type: none"> <li>• Copy of registration or business license, KRA PIN Certificate Business Permit.</li> </ul>	Yes/No
	<ul style="list-style-type: none"> <li>• Present the cab service license,</li> </ul>	
	<ul style="list-style-type: none"> <li>• Vendor must be in the market for at least 3 years,</li> </ul>	
	<ul style="list-style-type: none"> <li>• Provide at least 3 (three) reference (Company name and contact) for which similar services were provided in the past 3 years,</li> </ul>	
	<ul style="list-style-type: none"> <li>• Insurance Certificates for all the fleet against all risks which states the period of insurance,</li> </ul>	
	<ul style="list-style-type: none"> <li>• Provide the Manifest and registration documents,</li> </ul>	
	<ul style="list-style-type: none"> <li>• Provide the inspection certificate.</li> </ul>	
Technical Approach & knowledge	<ul style="list-style-type: none"> <li>▪ Responsiveness to the technical specifications and requirements</li> </ul>	30
	<ul style="list-style-type: none"> <li>▪ Size of fleet, and vehicles should be equipped with (jump cables, Fire extinguisher, First Aid Kit, spare tire, jack, and tool kit),</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ The vehicles should be less than 10 years from the date of manufacture with preference for newer vehicles,</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ Vehicle inspection (to meet the minimum technical requirements)</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ Ability to replace the car within the same day in case the rented car requires maintenance or is non-operational.</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ The ability for the offeror to provide services, particularly in the areas outside of the capital city.</li> </ul>	
Past Performance	<ul style="list-style-type: none"> <li>▪ Record of well-established and successful delivery of similar services.</li> </ul>	20
	<ul style="list-style-type: none"> <li>▪ The bidder has provided evidence of its ability to provide transportation services through references that can affirm the vendor's technical qualifications required (3) letters,</li> </ul>	
Required Driver's Qualification	<ul style="list-style-type: none"> <li>▪ English/Swahili speaking driver,</li> </ul>	30
	<ul style="list-style-type: none"> <li>▪ Valid driver's license for operating a motor vehicle for passenger &amp; Professional service,</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ Providing &amp; demonstrated safety driving record and observe a basic courtesy to passenger(s),</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ Familiar with local routes and destination,</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ In possession of no prior accident records.</li> </ul>	
Price	The overall cost presented in the offer is reasonable and within budget	20

Total Points	100 points
--------------	------------

Please note that if there are significant deficiencies regarding responsiveness to the requirements of this RFQ, an offer may be deemed “non-responsive” and thereby disqualified from consideration. Counterpart reserves the right to waive immaterial deficiencies at its discretion.

Best-offer quotations are requested. It is anticipated that award will be made solely on the basis of these original quotations. However, Counterpart reserves the right to conduct any of the following:

- Counterpart may conduct negotiations with and/or request clarifications from any offeror prior to award.
- While preference will be given to offerors who can address the full technical requirements of this RFQ, Counterpart may issue a partial award or split the award among various suppliers, if in the best interest of the LIFT Kenya Project.
- Counterpart may cancel this RFQ at any time.

Please note that in submitting a response to this RFQ, the offeror understands that USDA is not a party to this solicitation and the offeror agrees that any protest hereunder must be presented—in writing with full explanations—to the **Kenya LIFT Project** for consideration, as USDA will not consider protests regarding procurements carried out by implementing partners. Counterpart, at its sole discretion, will make a final decision on the protest for this procurement.

#### **INSTRUCTIONS ON SUBMISSION OF OFFERS**

You are requested to submit signed and dated offers to the office (email: [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org)) specified in this solicitation at or before the exact time specified in this solicitation. Offerors must provide the following information:

- a. Cover letter signed by an authorized representative of the offeror, see Section 4
- b. The solicitation/RFQ number;
- c. The name, addresses (street, email, other), and telephone number of the offeror;
- d. Copy of offeror’s registration or business license, including Tax ID number.
- e. Brief qualifications of the consultant, organization or firm and its capacity to fulfill the technical specifications including corporate capabilities;
- f. Proof of eligibility to work and or registration in Kenya.
- g. Past performance information: include recent and relevant contacts for the same or similar items and other references (including points of contact with telephone numbers and email addresses);
- h. Price quote
- i. “Remit to” address, if different than mailing address.
- j. AI Use Disclosure Questionnaire, See Section 5.

It is contemplated multiple firm fixed price vendor contracts will be awarded to the responsive Offerors whose offers have the highest evaluation scores. COUNTERPART reserves the right to make an award based on initial submission. COUNTERPART reserves the right to make no award if it is determined that the offers submitted do not satisfy the needs of the organization. Offers shall be submitted via email and received no later than on the closing date and time. Offers received after the specified time and date will be considered late and will be considered only at the discretion of COUNTERPART. All written proposals submitted must be valid for a period of not less than ninety (90) calendar days from the stated closing date.

## **6. QUESTIONS AND REQUESTS FOR CLARIFICATIONS**

Questions regarding the technical or administrative requirements of this RFQ may be submitted no later than 5:00PM local Nairobi time on May 14, 2026 by email to [procurement.ke1133@counterpart.org](mailto:procurement.ke1133@counterpart.org). Questions must be submitted in writing; phone calls will not be accepted. Questions and requests for clarification—and the responses thereto will be posted on COUNTERPART’s website as an amendment to the RFQ.

Only the written answers posted by COUNTERPART will be considered official and carry weight in the RFQ process and subsequent evaluation. Any verbal information received from employees of COUNTERPART or any other entity should not be considered as an official response to any questions regarding this RFQ.

**Bidders are prohibited from contacting Counterpart employees about this RFQ or scope of work by any other means and can be disqualified as a violation of Counterpart’s procurement ethics.**

## **7. NOTIFICATION OF SELECTION**

Prior to the expiration period of proposal validity, COUNTERPART will notify the offeror who submitted the highest scoring proposal in writing by Email. Clarifications and revision of minor errors and omissions may be requested. Upon completion of either, offeror may be required to submit a revised quote.

## **8. Acceptance of Privacy Policy, Data Protection, AI Usage and Terms and Conditions.**

By Submitting quotation/proposal to Counterpart International, The company or the individual consents to Counterpart’s privacy policy, terms and conditions (<https://www.counterpart.org/terms-and-conditions/>), and provides Counterpart International permission to process the company’s or individual’s personal data specifically for the performance of, and purposes identified in, this solicitation document and in compliance with Counterpart’s legal obligations under applicable United States and European Union laws, data protection and regulations and any other applicable legal requirements. The company/Individual may withdraw their consent at any time by contacting [privacy@counterpart.org](mailto:privacy@counterpart.org). If consent is withdrawn, Counterpart reserve’s the right to accept or reject the offer.

Counterpart must approve any AI used as part of the services or deliverables.



## Section 2: Offer Checklist

To assist offerors in preparation of proposals, the following checklist summarizes the documentation to include an offer in response to this RFQ:

- Cover letter, signed by an authorized representative of the offeror (see Section 4 for template)
- Official quotation, including specifications of offered services (see Section 3 for example format)
- Copy of offeror's registration or business license (see Section 1.5 for more details)
- Signed AI Disclosure Questionnaire

### Section 3A: Specifications and Technical Requirements

The table below contains the technical requirements of the rental car services. Offerors are requested to provide quotations containing the information below on official letterhead or official quotation format. In the event this is not possible, offerors may complete this Section 3 and submit a signed/stamped version to Counterpart. Offerors shall clearly indicate whether the quoted prices are inclusive or exclusive of Value Added Tax (VAT). Where VAT is applicable, it should be shown separately, including the applicable VAT rate, to facilitate proper evaluation and comparison of bids. Where VAT exemption applies, the applicable exemption process will be communicated to the successful offeror and reflected in the contract.

No.	Description and Specifications of Item	Unit	Items and Specifications Offered	Year 1	Year 2
				Unit Price	Unit Price
				(KES)	(KES)
1	Full-time vehicle rental – mid-size SUV or equivalent (Mon–Fri, available for 10 hours) including driver, fuel, maintenance, and insurance <b>per month</b> .	<i>Per month</i>	<i>Refer to section 3B</i>		
2	Vehicle rental (mid-size SUV or equivalent), including driver, fuel, maintenance, and insurance	<i>Per KM usage</i>	<i>Refer to section 3B</i>		
3	Travel to more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent).	<i>Per day</i>	<i>Refer to section 3B</i>		
4	Travel to more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent).	<i>Per KM usage</i>	<i>Refer to section 3B</i>		
5	Overnight rate (outside Nairobi) inclusive of driver accommodation, meals & incidentals	Per Night	<i>Refer to section 3B</i>		
6	Standby vehicle (mid-size SUV or equivalent) (if required, billed only upon use)	Per Day	<i>Refer to section 3B</i>		

Counterpart International will decide whether to go with a monthly, daily or per KM rate, or a combination of items

Delivery time (after receipt of order): \_\_\_\_\_ calendar days

## Section 3B

### Quotations

Offerors must structure their pricing as described in schedule 3A above based on:

- A fixed monthly rate for vehicle rental;
- Per KM rate for vehicle rental;
- A fixed daily rate for travel to more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent);
- Per KM rate for travel to more demanding terrain (e.g., remote field locations) using a 4x4 vehicle (e.g., Toyota Prado, Land Cruiser, or equivalent);
- A daily/nightly rate for overnight assignments outside Nairobi;
- Daily rate for a Standby vehicle (mid-size SUV or equivalent)
- Any additional optional costs clearly itemized.

**Section 4: Offer Cover Letter**

*The following cover letter must be placed on letterhead and completed/signed/stamped by a representative authorized to sign on behalf of the offeror:*

To: **USDA-funded Livestock Innovation and Feed Transformation (LIFT) project, Kenya**

Reference: RFQ no. **KEN/Admin/1133/013**

To Whom It May Concern:

We, the undersigned, hereby provide the attached offer to perform all work required to complete the activities and requirements as described in the above-referenced RFQ. Please find our offer attached.

We hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFQ. We further certify that the below-named firm—as well as the firm’s principal officers and all commodities and services offered in response to this RFQ—are eligible to participate in this procurement under the terms of this solicitation and under USAID regulations.

Furthermore, we hereby certify that, to the best of our knowledge and belief:

- We have no close, familial, or financial relationships with any Counterpart or USDA-funded Livestock Innovation and Feed Transformation (LIFT) project, Kenya staff members;
- We have no close, familial, or financial relationships with any other offerors submitting proposals in response to the above-referenced RFQ; and
- The prices in our offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
- All information in our proposal and all supporting documentation is authentic and accurate.
- We understand and agree to Counterpart’ prohibitions against fraud, bribery, and kickbacks.

We hereby certify that the enclosed representations, certifications, and other statements are accurate, current, and complete.

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

Name and Title of Signatory: \_\_\_\_\_

Date: \_\_\_\_\_

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

Company Address: \_\_\_\_\_

Company Telephone and Website: \_\_\_\_\_

Company Registration or Taxpayer ID Number: \_\_\_\_\_

Does the company have an active bank account (Yes/No)? \_\_\_\_\_

Official name associated with bank account (for payment): \_\_\_\_\_

## Section 5: AI Use Disclosure Questionnaire

The AI Disclosure questionnaire is used to disclose whether and how artificial intelligence (AI) tools or systems will be used in connection with the services provided, and to ensure appropriate protections for Counterpart's data, confidentiality, intellectual property, and security. Counterpart must approve any AI Used as Part of the Services or Deliverables, and a signed version will be incorporated into any contract made with Counterpart.

### **Instructions (Disclosure of AI Use)**

1. Check one category below and briefly describe any AI use (tool + purpose) (Commercial tool include Microsoft Copilot, ChatGPT, Claude, Gemini, Perplexity, Grammarly, DeepL, Midjourney, DALL·E). If none, select Category 3 and write "No AI will be used."
2. If AI is used, state what Counterpart/client/PII/confidential data (if any) will be entered and where it is processed/stored (and retention, if applicable).
3. Confirm: no training/commingling of Counterpart data; you remain responsible for deliverables (human review); and you will notify Counterpart and get approval before any change in AI use.

#### **A. Category Selection (check one)**

- Category 1 – AI Used as Part of the Services or Deliverables
- Category 2 – Incidental Use of Commercial AI Tools Only
- Category 3- No use of AI as part of the Services or Deliverables

#### **B. Provide more information based on the category you selected.**

##### **1. Category 1 – AI Used as Part of the Services or Deliverables**

Applies when AI is part of the services or deliverables and/or processes Counterpart or client data. Requires approval by the Chief Operating Officer or another Corporate Officer.

#### **Category 1 – Required Information (complete all):**

AI tool/system name(s): \_\_\_\_\_

AI provider(s): \_\_\_\_\_

Purpose / use case: \_\_\_\_\_

Data involved (check all):  Company  Client/Donor  PII  Other: \_\_\_\_\_

Data processing/storage location: \_\_\_\_\_

Data retention period: \_\_\_\_\_

AI training using Company data?  No  Yes

##### **2. Category 2 – Incidental Use of Commercial AI Tools Only**

Applies only to limited productivity use and not to deliverables.

**Category 2 – Required Confirmations**

**I confirm that:**

- No Counterpart, client, donor, or confidential data is entered
- AI outputs are reviewed and verified by me
- AI does not produce deliverables or decisions
- AI is not trained using Counterpart’s information

AI tools used (if any):

Description of incidental use:

**General Reminders**

Approval is required before AI in Category is used. Inaccurate or incomplete disclosure may result in delayed approval, non-payment, suspension of AI use, or contract termination.

**Offeror’s Signature Signed by Authorized Representative**

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

Position:

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