



Caribbean Region

Caribbean Biodiversity Fund

German Financial Cooperation with CARICOM

Regional Integration in Marine Protection

(BMZ No. 2017.68.910)

**Tender Document
for
Consulting Services for
Caribbean Biodiversity Fund
Communications Specialist**

(February, 2021)

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Documents available on KfW's website www.kfw.de

[Guidelines for the Assignment of Consultants in Financial Cooperation with Partner Countries](#)

[Standard Consulting Contract Model](#)

CONDITIONS OF TENDER

1 TENDER PROCEDURE

1.01 General

The rules of the present Tender are in accordance with the latest version of the “KfW Guidelines for the Assignment of Consultants in Financial Cooperation with Partner Countries.” These Conditions of Tender contain the General Conditions (Chapter 1 including 6) and the Special Conditions of Tender (SCT) for this particular tender (Chapter 7). The Special Conditions of Tender are referred to in the text by “⇒SCT” and summarised in Chapter 7.

Bidders are advised to thoroughly study both the General and the Special Conditions to avoid downgrading or rejection.

1.02 Project Executing Agency

The Project Executing Agency subsequently called PEA is indicated in the ⇒SCT.

1.03 Presentation of Tender

The Tender should be submitted in one sealed package containing two clearly marked separate and also sealed envelopes: one with “Technical Proposal” and the other with “Financial Proposal”. If financial information is included in the Technical Proposal, the Tender shall be rejected.

The package shall display the following information:

- the name of the institution and the address where Tenders have to be sent to;
- the title of the call for Tenders such as indicated in the invitation letter;
- the Tenderer’s name;
- the following words clearly visible: “Call for Tenders – Not to be opened by the Postal Service”.

1.04 Language of the Tender

The technical and financial proposals as well as all communication related to the present Tender shall be prepared in the language indicated in the ⇒SCT.

1.05 Submission of Tender

Tenders should be sent in one (1) clearly marked and signed original and two (2) copies or delivered in person, against confirmation of receipt, to the address indicated in the ⇒SCT.

The deadline for receipt of Tenders is specified in the ⇒SCT. All Tenders received after that deadline will be rejected automatically without being evaluated.

1.06 Validity Period of Tenders

Unless otherwise stated in the ⇒SCT the period of validity of the Tenders counted from the deadline for receipt of Tenders is 180 days.

1.07 Information Visit to Site and Pre-Bid Meeting

Tenderers are invited to carry out an information visit to the site in order to familiarise themselves with the local conditions relevant for the execution of the services to be provided. Interviews may be arranged with the PEA. Tenderers shall contact the addresses indicated in the ⇒SCT in due time before the visit to announce themselves and to allow for appropriate arrangements.

A pre-bid meeting and a common information visit for all Tenderers are scheduled at the dates and places indicated in the ⇒SCT.

It is understood that all information visits to the site are at the Tenderer's own expense and risk.

1.08 Request for Additional Information

Any question, communication or requests for additional information concerning this call for Tenders are only permitted in writing (email) and up to 10 days before the deadline for the submission of the proposals. Such requests are to be sent to the e-mail address indicated in the ⇨SCT. If any clarification of the call for Tenders proves necessary, the answers will be communicated simultaneously in writing to all Tenderers.

1.09 Amendments to the Tender Dossier

Any change made to the Tender dossier during the Tender period by the PEA will be communicated forthwith in writing to all prospective Tenderers who have been provided with the Tender documents, together with notice of any extension of the Tender period which the PEA in accordance with KfW may consider necessary to enable Tenderers to take account of such a change.

1.10 Association

Pre-selected Consultants/Consortia may form an association with other pre-selected Consultants/Consortia only with the prior approval of the PEA and KfW. Any substantial amendments to the composition of a pre-selected Consultant or the association of an additional or new partner must be justified by the Tenderer and be approved by the PEA and KfW. Otherwise, the PEA and KfW reserve the right to exclude the applicant from the Tender procedure. The Tenderer shall present his request not later than two (2) weeks before submission date.

1.11 Pre-selected Consultants

If a pre-selection has been undertaken, a list of pre-selected Consultants is given in Annex B to these Conditions of Tender.

2 CONTENTS OF THE TENDER

2.01 Technical Proposal

Unless otherwise stipulated in the ⇒SCT the technical proposal shall contain:

a) Critical Analysis of Project Objectives and Terms of Reference (TOR)

The Tenderer is explicitly encouraged to present a detailed critical analysis and the Tenderer's interpretation of the project's objectives and the TOR. This might encompass critical comments and doubts about the suitability, consistency and feasibility of individual aspects and the concept as a whole, if any. The methodology suggested must take constructive account of these.

b) Proposed Concept and Methods

This section will contain:

- Conceptual and methodological approach proposed to carry out the services. In this context, the Tenderer is explicitly encouraged not to repeat the TOR but to show the suitability of his concept in regard to the TOR and his comments made on these;
- A working programme (appropriate chart/graph) showing clearly the different project phases as well as the main tasks planned, their duration and their interactions. The chart/graph shall also include milestones, deadlines for discussions, decisions and submission of reports;
- A staff assignment matrix clearly showing the proposed team of experts, backstopping and supporting staff and the activities for which they will be assigned.
- A staffing schedule clearly showing times and places of effective assignment for each professional. The chart shall be completed or accompanied by a table stating the responsibilities and precise periods of duty for each professional by places of assignment. These periods shall be broken down to each project phase. In this table the assignment of expatriate and local staff will be treated separately. The Tenderer is encouraged to include junior staff in his team subject to available guidance within a team headed by senior professional staff and application of adequate rates. If certain tasks are not exclusively performed at site, the Tenderer has to describe how the execution and co-operation between site and home office staff is assured;
- A statement of work organisation and an organisation chart showing the Tenderer's (association's) internal organisation as well as the interactions with the PEA and KfW as well as with other stakeholders. Responsibilities within the project team have to be defined;
- Envisaged back-up services by the home office for the team working locally on technical and administrative questions that could arise during project implementation as well as for the controlling and monitoring of the work;
- Procedures for quality control management of services (reports, documents, drawings), including those prepared by associates, sub-consultants and local partners, before submission to the PEA and KfW. Plain reference to ISO 9001 is not considered to be adequate;
- Planned logistics and facilities for the execution of the services.

The Tenderer is invited to comment on those items of the above-mentioned fields that require additional explanation. The texts and information should be compiled and presented in a way that is related to the project. Tenderers shall refrain from long explanations in the style of a textbook. The presentation of diagrams, tables and graphics is preferred.

c) Key Staff

The Tenderer shall provide a detailed description of tasks to be performed by each team member (including back-up staff in the home office) as well as details on the selection and experience of the proposed members with regard to their tasks.

Furthermore, the Tenderer shall provide updated curricula vitae (CV) of the proposed key staff and professional support staff according to the model given in Annex C-1. Key staff should have adequate education, professional experience and experience in the region. Unless

stipulated otherwise in the ⇒SCT, region includes the country and neighbouring countries with similar political, socio-economic and cultural conditions. It is particularly expected that key staff has project- and job/post-related experience and has completed similar tasks in similar projects of similar magnitude and with international financing. The CV shall indicate whether the proposed staff member is part of the Tenderer's permanent personnel or not. To support transparency and for ease of evaluation, the Tenderer has to summarise the essential data of proposed key staff according to the Table in Annex C-2. In case of ambiguities, the CV prevails. Key staff presented in the Tenderer's proposal may not be replaced without the prior approval of the PEA and KfW. The Tenderer shall only replace staff with a person of equal or better qualification.

d) Sub-contractors

The Tenderer will clearly specify the services to be carried out by sub-contractors other than those being part of the Consultant/Association. This basically includes all additional services. He shall indicate the firms to whom he intends to sub-contract such services.

e) Declarations

The Tenderer shall provide the following declarations issued after the date of the invitation letter:

- Declaration of association duly signed by all partners and specifying clearly the type of association and the lead firm. Sub-contractors also need to submit a declaration of association.
- Declaration of affiliations (no conflict of interest): In a duly signed declaration, the Tenderer has to reveal any links with other firms which may present a conflict of interest in providing the envisaged services. He must give a binding declaration that, should he be awarded the contract, the firms with which he is associated will not intend to take part in the project in any form. For an association, all members must provide this declaration. Sub-contractors do not need to submit the declaration.
- Declaration of undertaking: A duly signed declaration pursuant to Annex D shall be included (one separate declaration for each member in case of an association). Sub-contractors do not need to submit a declaration of undertaking.

2.02 Financial Proposal

Based on the quantities of staff and other services the Tenderer will submit a Financial Proposal. All rates will be in the currency indicated in the ⇒SCT. In the case of construction supervision or training projects the Tenderer shall assume a contract period as indicated in the ⇒SCT for the purpose of a fair evaluation and comparison of the staff input and related costs. For contributions of the PEA related to d) – h) below refer to 4.04 and to the ⇒SCT.

The Financial Proposal shall contain the following information and be structured as detailed in Annex E.

a) Cost of Personnel for international and local/regional staff including monthly home office rate, including salary, social charges and overhead cost, bonus, vacation and sick leave, home office cost, all medical examinations, professional training, back-up services from home office (professional, personal and administrative), cost of IT equipment, company's professional insurance, risk and profit.

b) Allowance and accommodation for expatriates (hotel rent or provision of flat/house with provision of furniture and equipment through rent or purchase) and, if necessary, for local staff (per month).

c) International Travel Cost contain

- international airfares, including complimentary travel cost (e.g. transfer cost to and from airports, visa, airport tax, excess baggage and/or air freight, medical expenses, visa, etc.) as a lump sum item per round trip.
- airfares for inspection flights, if any

d) Cost for Local Transport contain

- lease or rent of project vehicles or depreciation cost of vehicles owned by the Tenderer as lump sum item per month of operation (for acquisition of vehicles under the project budget and the related procedures refer to item g) hereunder);
- running cost of own or leased/rented vehicles as a monthly lump sum item per car including gasoline, oil, tires and other consumables, all risk insurance, maintenance and repair costs as well as costs for driver. Private use of official vehicles during off-duty time (if allowed) has to be specified in the Financial Proposal and a deduction of 20 % on the running cost has to be accounted for;
- cost for local air, road and rail travel, if any, as a lump sum item;
- taxi costs for local transport demand peaks.

e) Cost for the Local Project Office shall be offered as monthly lump sums, consisting of

- office rent
- office operation cost (include cleaning, electricity, water, heating, air conditioning, insurance, telecommunication, international and local freight, post, etc. and all office consumables).

f) Production of Reports shall be offered as lump sum item per copy of a specific report covering costs for report production (including freight and local distribution) as specified in the TOR or in the Technical Proposal. The cost of progress photographs, whether specifically taken and used for the reports or not, are included in the relevant lump sum item as well.

g) Procurement of equipment: The Financial Proposal shall include procurement of all office and work equipment like vehicles (other than leased/rented or owned by the Tenderer), furniture, appliances, survey, measuring and test instruments etc., which the Tenderer deems necessary for the execution of the project and which, after termination of his services, will be handed over to the PEA taking into account normal wear and tear under the operational conditions of the project. The respective cost shall be included as lump sum item. No handling charges will be accepted.

Note: Procurement of goods and services for the project implementation through a disposition fund or otherwise has to be managed and controlled through inclusion of qualified and adequate staff in the team.

h) Miscellaneous costs include all expenses that might not be covered by the above categories. These costs should be expressed as lump sum items (preferably) otherwise they will be reimbursed in the currency as occurred upon presentation of documentary evidence. The following examples may fall under miscellaneous costs:

- additional services in accordance with Art. 2.01-d;
- acquisition of town maps, aerial photographs, satellite images;
- rental of project equipment (e.g. for geophysical surveys);
- topographical and soil surveys for sites and pipeline alignments;
- workshop/factory inspection cost;
- preparation and management of workshops and seminars;
- other budgets/provisional sums for various items, services or other expenses as already indicated in the model of statement of costs – if any.

Unless otherwise stated in the ⇒SCT taxes have to be indicated separately in the Financial Proposal.

Unless otherwise stated in the ⇒SCT no other cost items except those stated above will be accepted in the Financial Proposal and considered for payment. If the Tenderer considers an important cost component not covered by the above instructions, he may ask permission to include such item. Such a request shall reach the PEA and KfW not later than three (3) weeks before the submission date. The result will be communicated as a circular letter to all Tenderers.

3 PAYMENT CONDITIONS

3.01 Currency

All payments will be made in the currency (currencies) indicated in the ⇒SCT.

3.02 Taxes and Duties

Unless otherwise stated in the ⇒SCT the Tenderer shall prepare his offer under the assumption that he and his foreign staff are responsible for their own taxes in their individual country and is not the responsibility of KfW or the PEA.

3.03 Terms of Payment

The Tenderer shall assume for the preparation of his Financial Proposal that payments will be made in the following sequence:

Advance Payment: After signing of the contract the Consultant may claim an advance payment as stipulated in the ⇒SCT. The advance payment has to be reimbursed during the first 2/3 of the completion period. The guarantee can be reduced accordingly.

Instalments: The instalments shall be paid upon presentation of corresponding invoices with a maximum of one payment per quarter. The first invoice for the first instalment shall be presented, at the earliest, 3 months after the contractually agreed commencement of the Services Final Payment: the balance of 10% after acceptance of the Final Report by PEA and KfW and submission of the final invoice.

If the Tenderer requests changes in the disbursement schedule, he has to justify such a request adequately in his Proposal as an option. He may also make suitable and justified proposals for the conversion of reimbursable items to lump sums based on fixed rates. The final procedures and terms of payment will be defined during contract negotiations.

Unless otherwise stipulated in the Standard Consulting Contract or ⇒ SCT all invoices for interim and final payments including the corresponding report have to be approved by the PEA.

Special payment or invoicing conditions – if any – are indicated in the ⇒SCT.

3.04 Guarantees

Unless otherwise stated in the ⇒SCT neither a tender guarantee nor a performance guarantee is required.

4 ORGANISATION OF SERVICES

4.01 Project Duration

The duration of the project from commencement of services until presentation of the draft final report is indicated in the ⇒SCT. Approval periods for review and comments by PEA and KfW are indicated in the ⇒SCT. These are included in the project completion period.

4.02 Services Required

The services must satisfy in all respects the requirements laid down in the Terms of Reference (TOR) given in Annex A which will be part of the Consulting Contract. The preparation of the Tenderer's proposal includes a critical verification of these services and, if necessary, their completion or modification according to the Tenderer's own assessment of the local situation and his professional experience in order to achieve the set project objectives. In this context, the local standards and laws will be respected.

4.03 Performance of Services

The Consultant shall co-ordinate all his activities with the project coordinator designated by the PEA. All official communications to the PEA concerning the project are to be addressed simultaneously to KfW.

Unless stipulated otherwise in the ⇒SCT the Consultant will render his services in the project country. He will integrate the staff of the PEA as much as possible in his daily work in order to ensure a maximum of know-how transfer. In case services are to be performed outside the project country, the Tenderer shall submit detailed proposals in his technical offer.

4.04 Contribution of PEA

The Tenderer will take into account in his financial proposal that the PEA will

- provide the Tenderer with all the information, data, documents, documentation, etc. in his possession and necessary for the completion of his services, free of charge, for the duration of the project;
- ensure that the Tenderer has all the necessary permits to obtain further information (see above);
- support the Tenderer in obtaining all the necessary working permits, residence permits and import licenses;
- provide other contributions as stipulated in the ⇒SCT.

5 TENDER EVALUATION

5.01 General

The selection of the Consulting firm for the execution of services will be made in accordance with the KfW's latest "[Guidelines for the Assignment of Consultants in Financial Cooperation with Partner Countries](#)". The latest version of the KfW Guidelines can be downloaded from KfW's website www.kfw.de.

5.02 Technical Proposal

Only the envelope with the Technical Proposals will be opened on the submission date. Financial Proposals will remain sealed until the technical evaluation is completed.

The quality of each technical proposal will be evaluated on a scale of 0 to 100 points, according to the criteria given in the ⇒SCT, which will be examined in accordance with the requirements as indicated in the Terms of Reference.

If there are minor omissions in relation to the TOR points will be deducted. Omissions that restrict comparison with other bids, and disrespect of the proposed structure and content of the proposal may lead to the <exclusion of the applicant.

5.03 Financial Proposal

After evaluation of the Technical Proposal, the Financial Proposals of those Tenderers will be opened whose technical Proposal achieved a minimum of 75%.

After correcting any arithmetical errors, the price quotations will be assessed using the total price (not including customs and excise duties, taxes, levies and other charges in the project country). Reimbursables can be adjusted for the purposes of the assessment or excluded from the assessment, if this is the only way to make price quotations comparable. Optional offers of services will only be included in the assessment of price quotations if all bidders were requested to submit such offers in accordance with the terms of the invitation to tender. Any items missing in individual offers but necessary will be added. This will be done on the basis of the highest price of the corresponding cost item of the other Tenderers.

If foreign and local currencies are accepted (see ⇒SCT) local costs will be converted to Euro at the exchange rate of the submission date and that total cost will be used for the financial evaluation.

5.04 Final Evaluation

For the purpose of a combined evaluation the Technical Proposal of a Tenderer will be weighted 80% as follows:

$P_T = 80 * T/T_o$, with

P_T = attributed score for Technical Proposal,

T = Tenderer's score in the technical evaluation,

T_o = highest 'technical' score of all Tenderers.

Unless otherwise stipulated in the ⇒SCT the Financial Proposal of a Tenderer will be weighted % as follows:

$P_F = 20 * C_o/C$, with

P_F = attributed score for the Financial Proposal (points),

C = Tenderer's corrected price of the Financial Proposal,

C_o = lowest corrected Financial Proposal.

The total score of the Tender is

$P = P_F + P_T$.

The Tenderer who submitted the proposal with the highest total score will be invited for contract negotiations. The negotiations will clarify the work and methods to be used and any necessary staffing schedule adjustments. Fees and unit prices for incidental costs and services that were

to be offered on a lump-sum basis pursuant to the Conditions of Tender are, in principle, not subject to negotiation as they were already taken into account in assessing the Financial Proposal. If the negotiations with the Tenderer having the highest score will not be successful, negotiations with the Tenderer placed next will be undertaken until an agreement will be reached.

5.05 Consulting Contract

The Technical and Financial Proposals of the successful Tenderer will become part of the Contract to be concluded. PEA and KfW, however, reserve the right to negotiate and adapt those parts of the Tenderer's proposal which are considered inadequate with the requirements of the work.

After receipt of KfW's approval, the Contract with the selected Tenderer will come into force upon signing by the Tenderer and the PEA and achievement of effectiveness of the Project funding.

6 OTHER

6.01 Unsuccessful Tenderers

After the evaluation of the Technical Proposals the PEA will inform in writing those Tenderers that have not achieved the minimum required score. Their Financial Proposals will be returned unopened.

After the conclusion of the negotiations and receipt of KfW's consent to the negotiated Contract, the remaining Tenderers will be informed in writing by the PEA about the rejection of their proposals.

6.02 Cancellation of Tender

The tender procedure may be cancelled, prior to awarding the Contract, without thereby incurring any liability to the Tenderers, and notwithstanding the stage in the procedures leading to the conclusion of the Contract, if

- there was no adequate competition;
- none of the bids for services achieved the required minimum number of points;
- fundamental technical or financial aspects on which the invitation to tender was based have changed significantly prior to award of the contract; or
- the price quotations are obviously and clearly excessive. In that case, the alternative is either to hold a new tender procedure, with or without prequalification, or to commence negotiations on the price with the bidder who came first.

In the event of cancellation of the Tender procedure, Tenderers shall be notified thereof by the PEA. Such Tenderers shall not be entitled to compensation.

6.03 Other conditions

Other tender conditions or constraints, if any, are indicated in the ⇒SCT.

7 SPECIAL CONDITIONS OF TENDER (SCT)

GCT 1.01	
GCT 1.02	Project Executing Agency (PEA) is the: Caribbean Biodiversity Fund (CBF)
GCT 1.04	The language of the proposal and of all communication is English.
GCT 1.05	<p>The Tender documents are required to be submitted (postmarked) by Wednesday, March 17th, 2021. Tender documents submission must comply with Section 1.03 through 1.06 of the General Conditions (see above).</p> <p>Tender documents shall be sent by an express mail service capable of providing a tracking number (e.g., DHL) to the following address:</p> <p>Caribbean Biodiversity Fund C/O Junior Buchanan 4 Treaty Path Nannyville Gardens Kingston 3 Jamaica W.I.</p> <p>If mail carrier requires a recipient phone number and e-mail please use the following:</p> <p>secretariat@caribbeanbiodiversityfund.org</p> <p>+1-876-367-5739</p> <p>Once package is mailed please send the tracking number to secretariat@caribbeanbiodiversityfund.org</p>
GCT 1.06	Bid validity is 180 days.
GCT 1.07	
GCT 1.08	<p>Requests for additional information shall be sent via e-mail to the following address: secretariat@caribbeanbiodiversityfund.org with Subject Line: Questions on Communications Specialist Consultancy Tender Process</p> <p>If necessary, the PEA will be involved and answer at the latest 10 days (March 7th, 2021) before submission date deadline.</p>
GCT 2.01	Regional countries are: Antigua and Barbuda, Bahamas, Barbados, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago
GCT 2.02	The currency of the Financial Proposal shall be EURO (EUR).

GCT 3.01	The currency of the proposal shall be EURO (EUR).
GCT 3.02	
GCT ¡Error! No se encuentra el origen de la referencia.	Payments will be done on a lump-sum basis for the full consultancy, with a payment scheduled to be defined during the contract negotiation process.
GCT 3.03	
GCT 4.01	The project duration from the date of commencement of services is estimated at 24 months .
GCT 4.01	
GCT 4.03	
GCT 5.02	The technical evaluation will be done using the criteria contained in Annex F.
GCT 5.03	Note that travel costs shall not be included in the financial proposal. Financial proposal budget lines related to travel contained in Annex E shall be left blank. At the moment, the CBF has halted all staff and consultants travel until further notice. If and when CBF business travel resumes the CBF will provide travel costs on an expense basis and following CBF travel policies and procedures. Also note that for costs associated to specific communication products and tools the CBF has a separate budget.

Annex A
Terms of Reference (TOR)



TERMS OF REFERENCE

CBF COMMUNICATIONS SPECIALIST

The Caribbean Biodiversity Fund (CBF), with the support of the German Government through the German Development Bank – KfW, invites qualified individuals (“Consultants”) to apply for the “CBF Communication Specialist” consultancy to support the CBF’s institutional and programmatic communication needs, and key partnerships.

1. BACKGROUND

The Caribbean Biodiversity Fund (CBF) is a regional environmental fund whose mission is “to ensure continuous funding for conservation and sustainable development in the Caribbean.” Established in 2012, and with a flexible structure, the CBF is designed to accommodate the receipt, investment, distribution and monitoring of conservation funding throughout the region. Currently, the CBF has two programs: (i) a Conservation Finance Program, anchored by a US\$75 million endowment fund and (ii) a Climate Change Program, focused on Ecosystem-based Adaptation (EbA), with a US\$50 million sinking fund.

Under the *Conservation Finance Program*, and through its Endowment, the CBF provides financial resources through eligible National Conservation Trust Funds (NCTFs) that have signed Partnership Agreements with the CBF. The Partner NCTFs then lead the grant-making at the national level with resources from the CBF and other donors. To date, CBF has established 9 Partnership Agreements. Six of these NCTFs have already received CBF funds and are at different stages of supporting on the ground and in the water activities with CBF resources. It is expected that by 2023 the CBF will have signed a total of 12 Partnership Agreements with NCTFs throughout the Caribbean. Activities financed under this program may include, but are not limited to, support for protected areas management and establishment (including management plans), infrastructure within and outside protected areas for the support of protected areas and natural resources management, environmental education, community engagement on natural resources management, environmental policy, research and studies. Under the Conservation Finance Program, main beneficiaries are National Conservation Trust Funds (NCTFs) who then sub-grant

CBF Funds to NCTF grantees which can include government, NGOs, small private association (of fisherfolk and farmers for example), and research and academic institutions¹.

In addition, the Conservation Finance Program includes an organizational development component aimed at strengthening the network of conservation trust funds that are part of the Caribbean Regional Finance Architecture. Areas of focus for institutional strengthening are governance, operations, administration, reporting, monitoring, evaluation & learning, environmental, social and governance safeguards; asset management, support for finance mechanisms development, and resource mobilization. Targeted countries under the overall program currently include Antigua & Barbuda, Bahamas, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Saint Kitts and Nevis, Saint Lucia, and Saint Vincent & the Grenadines.

Under the *Climate Change Program*, and through the Ecosystem-based Adaptation (EbA) Facility, the CBF is distributing grants directly to local, national and regional projects through competitive calls for proposals with the aim of supporting effective climate change adaptation measures in the marine and coastal zone of the insular Caribbean. These actions include restoration and rehabilitation of ecosystems, reduction of land-based stressors, other measures to reduce pressures on ecosystems, measures to reduce physical damage to ecosystems, installation of artificial reefs, and grey-green infrastructure (hybrid solutions) relevant to the EbA approach. Projects can be implemented by local, national, regional or international non-government organizations (NGOs), national conservation trust funds (NCTFs), community-based organizations (CBOs), government agencies, regional organizations, private sector companies, universities and other academic institutions, and consortia of organizations. The grants are focused on helping people adapt to adverse effects of climate change, reduce disaster risk, and build resilient ecosystems and economies.

Currently the EbA Facility has committed about US\$12 million through 11 grants under its first Call for Proposals in 2019. This will increase with subsequent calls for proposals to potentially up to 45 projects. A 2nd Call for Proposals (CfPs) is currently under way with a total of 4 CfPs planned. Targeted countries under this program currently include Antigua & Barbuda, Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Saint Lucia, and Saint Vincent & the Grenadines. Montserrat will be added for future CfPs. The Bahamas, Barbados, Saint Kitts and Nevis, and Trinidad and Tobago may also benefit through regional projects.

In addition to the current operations described above, the CBF continues to pursue new opportunities. In 2021, the CBF expects to initiate the operational phase of its new program and instrument on the *Circular Economy* to be funded and designed in partnership with the German Government through KfW. The CBF is also exploring and developing new partnerships with regional organizations for the CBF to serve as the financial platform to provide sustainability to other initiatives by creating additional endowments and other financial instruments.

CBF partner donors to date include the Government of Germany (Federal Ministry of Economic Cooperation and Development – BMZ, and the Federal Ministry of the Environment, Nature Conservation and Nuclear Safety -BMU) through the German Development Bank (KfW), The

¹ NCTF payments currently ranges from US\$ 200,000 to US\$420,000. Sub-grants currently range from US\$12,000 to 50,000.

Nature Conservancy (TNC), and the Global Environment Facility (GEF) — through the World Bank and the United Nations Development Program (UNDP).

More information about the CBF can be found at <http://www.caribbeanbiodiversityfund.org>

2. OBJECTIVE OF THE CONSULTANCY

The objective of this consultancy is to assist the CBF in developing and implementing its Communication, Outreach, and Marketing Strategy. The Strategy and its implementation has been identified as a key instrument for ensuring CBF's and the overall Caribbean Sustainable Finance Architecture's visibility at the national, regional and international levels, and as a key tool to support fundraising efforts, raising awareness, and consolidating the overall Architecture. In addition, this Strategy is a crucial element for the engagement of CBF with different types of stakeholders including, but not limited to, government, regional organization, donors, partners, civil society and the private sector.

Given the importance of communications to fulfil the CBF mandate and strategic plan, it is critical that communications, outreach and marketing are mainstreamed into CBF's day to day activities. This should happen in terms of financing of institutional communications needs, overall definition of CBF staff role in the process, and accountability for results.

In performing the assigned tasks, the Consultant will report directly to the Chief Executive Officer (CEO) and together with the CEO will develop a full program of activities for the consultancy period. The Consultant will also work closely and liaise with CBF Program Managers, other CBF staff, other consultants being hired by the CBF, and interact and support CBF's engagement with key partners such as current and new CBF Partner National Conservation Trust Funds, Caribbean Challenge Initiative, the Global Island Partnership, and others.

3. AVAILABLE DOCUMENTS

CBF will share available documentation with the Consultant, comprising, but not be limited to:

- CBF governance documents such as Articles of Association, Operational Manuals and Policies and Procedures;
- CBF Newsletters;
- Access to CBF website and social media platforms;
- Documents related to CBF Programs and funded activities;
- Documents related to CBF key partnerships;
- CBF logo user guidelines
- Any other relevant documentation as needed.

4. SCOPE OF WORK

During the course of the consultancy the tasks and duties are expected to, but may not be limited to, include the following:

Task 1: Initial Familiarization with Documentation, Inception Call and Final Work Plan

This task includes the Consultant getting familiarized with the available documentation and institution and critically verifying the scope of services indicated, and modify those, in agreement with CBF and KfW, according to his/her own professional judgement and knowledge. The Consultant shall arrange an inception call with CBF and KfW, including preparation of a draft agenda. Ten business days after the inception call, the consultant shall present for CBF and KfW approval a draft Work Plan for the assignment to accomplish the consultancy's deliverables described below, and which indicates activities, schedules and outcomes.

The agreed overall approach (including document reviews/desk studies, any remote or direct focus group discussions, interviews etc. and collaboration between different events and assignments) and final work plan for the assignment and any resulting changes to the Terms of Reference will be part of the deliverables upon completion of Task 1.

Task 2: Communications, Outreach, and Marketing Strategy

The Consultant will develop a draft 5-year Communications, Outreach, and Marketing Strategy, including developing a baseline, expected targets and clear and measurable metrics (indicators) to track implementation progress. In general, the new strategy shall seek to accomplish the following overarching goals:

Goal 1. Establish the CBF as a credible, effective, transparent, and trustworthy organization.

Goal 2. Help create the enabling conditions and support the overall Caribbean Sustainable Finance Architecture by raising awareness of the regional work among target audiences.

Goal 3. Build the necessary institutional infrastructure and tools for effective and efficient communications.

In achieving the above mentioned goals, the Strategy and its implementation shall look into all relevant aspects of communications for the CBF, including but not limited to: i) external and internal (i.e. with Board and Committees) communications; ii) assess the specific communication needs and required actions for the CBF Conservation Finance and Climate Change Programs, and potential future programs; iii) assess, develop and improve communications platforms to be used and or modified, iv) develop innovative communication tools; v) analyze and propose how to improve the overall branding of the CBF and that of the overall Caribbean Sustainable Finance Architecture; vi) significantly expand the CBF media presence in the Caribbean region an internationally. The Strategy shall also include a framework for including communication activities into the CBF Annual Work Plan, including roles and responsibilities.

This task will potentially be developed in parallel and incorporate aspects of other tasks described below. The development of Task 3 activities are expected to be incorporated in the overall

Strategy. The target date for delivery will be agreed upon as part of the Work Plan presentation and discussion (Task 1).

Task 3: Development of communications, outreach and marketing products

During the course of the assignment the Consultant will lead, co-lead or contribute to the development of communications and marketing products. A separate budget for products and services is available. The consultant will work with the CBF Team, led by the CEO, on preparing, as needed, a procurement plan for the communications, outreach and marketing products and services.

Indicative list of deliverables (products and activities):

1. Factsheets and infographics
 - a. Review of /development of content for CBF fact sheets, liaise with graphic designer.
 - b. Develop content for CBF specific infographics, including tailored ones for CBF programs.
 - c. Support key partners, including CBF grantees, in fact sheets and infographics development as related to CBF activities and funding.
2. CBF Website
 - a. Lead redesign process of institutional website content and look and liaise with web developers to facilitate portrayal of redesigned websites.
 - b. Manage CBF website content. Coordinate with and liaise with CBF Administrative Assistant and website management company.
3. Social Media and other digital platforms
 - a. Develop and manage CBF social media content and platforms (Facebook, LinkedIn, others), including development of a Social Media Plan and schedule of posts as well as performance analysis and reporting.
4. Videos
 - a. Develop content and scripts for CBF videos and liaise with video producers in the production of the videos.
 - b. Support videos for key partnerships as needed.
5. Newsletter
 - a. Develop a Newsletter Plan and quarterly schedule of articles.
 - b. Co-ordinate the quarterly publication of the Newsletter.
6. Power Point Presentations
 - a. Revamp and maintain the CBF institutional deck of power point slides.
 - b. Assist with the preparation of power point presentations for the CBF.
7. Strategic Plan and Reports
 - a. Support the development and implementation of CBF Strategic Plan and reports, including reports to donors, annual reports, and others.

8. Develop a CBF style guide (colors, fonts, other style guidelines) and use of CBF brand for all communications across different channels.
9. Other marketing, outreach, and communications products.

Task 4: Events Support

The Consultant will play an active role in supporting the design and implementation of events, including virtual ones. Part of this role includes the development of specific communication plans for each event. Specific events and deliverables include, but are not limited to, the following:

1. CBF events
 - a. Develop a specific communications plan, as needed, for internal and external CBF events including CBF Board, Committee an Annual Meetings, and regional events organized or sponsored by the CBF.
 - b. Lead the implementation of the plan.
2. Engagement in international events
 - a. These may include, but are not limited to, CBF and overall Caribbean Sustainable Finance Architecture engagement in IUCN Congresses, RedLAC - Latin American, UN Convention on Biological Diversity, UN Convention on Climate Change.
 - b. Develop event specific communication plans and products.
3. CBF Webinars series
 - a. Support the establishment of webinar series that highlight CBF's work
 - b. Support CBF participation in external webinars.

Task 5: Media Engagement

The Consultant will establish a media relations platform to generate media exposure. Specific deliverables include:

- a. Establishment of a database of relevant media outlets, roster and contacts.
- b. Produce and distribute press releases for CBF, including as needed development and review press releases of CBF partners, including NCTFs and EbA Facility grantees, and other associates.
- c. Serve as focal point for CBF media relations

Task 6: Capacity building

The consultant will support the CBF and overall Caribbean Sustainable Finance Architecture. Specific deliverables include:

- a. Training to CBF Staff, particularly the CEO and Program Managers, on media engagement.

- b. Design and implement capacity building activities on communications for Caribbean National Conservation Trust Funds.
- c. Provide training for the NCTFs Executive Directors on media engagement.
- d. Other tasks as agreed upon.

5. SCHEDULE AND DURATION OF ASSIGNMENT

The Assignment is expected to last 24 months commencing in April 2021 and ending on March 2023. The overall effort is estimated at an equivalent of a full-time position.

6. REQUIRED EXPERTISE FOR THE ASSIGNMENT

The Consultant shall have the following expertise:

- A minimum of 7 years of progressive experience in supporting communications, outreach and marketing for an institution with a similar or a related mission to that of the CBF;
- Experience with non-governmental organizations in the conservation, climate change and sustainable development fields or related ones;
- Work experience with conservation/environment trust funds a strong asset;
- A Bachelor's degree in communications or related disciplines. A Master's Degree in communications or related field is preferred;
- Proven experience managing and developing communications content using different kinds of communication platforms;
- Proven experience in website and social media platforms management;
- Excellent writing and reporting skills, including reviewing funding proposals;
- Proven experience with media engagement and press relations;
- Proven ability to develop tailored training materials on communications, outreach and marketing;
- Proven experience in organizing events;
- Excellent and proven skills to work efficiently with partners;
- Work experience in the insular Caribbean region and/or SIDS and/or Latin America context strongly preferred.
- Excellent oral and written communication skills in English. Spanish fluency both oral and written strongly preferred. Working knowledge of French an asset.

Annex B
List of Pre-selected individuals/Firms

Annex B is Non-applicable

Annex C - 1
Presentation of Curricula Vitae

Proposed position in the project:

The comprehensive Curricula Vitae of the individual shall be presented in the form as shown below (EU-Format):

1. Family name:
2. First names:
3. Date of birth:
4. Nationality:
5. Civil status:
6. Education:

Institution	
Date: from (month/year) to (month/year)	
Degree(s) or Diploma(s) obtained	

7. Language skills, mark 1 (worst) to 5 (best) for competence:

Language	Reading	Speaking	Writing

8. Membership of professional bodies:

9. Other skills:

10. Present position:

11. Years within the firm:

12. Key qualifications (relevant to the project):

13. Specific country experience:

Country	Date: from (month/year) to (month/year)

14. Professional experience record (projects):

Date: from - to (month/year)	
Location	
Company	
Position	
Description	

add more projects

...

15. Others (e.g. publications):

Annex D

Declaration of Undertaking

Guidelines for the Procurement of Consulting Services, Works, Plant, Goods and Non-Consulting Services in Financial Cooperation with Partner Countries

Declaration of Undertaking

Reference Name of the Application:

To: Caribbean Biodiversity Fund

1. I/We recognise and accept that KfW only finances projects of the Project Executing Agency ("PEA")¹² subject to its own conditions which are set out in the Funding Agreement it has entered into with the PEA. As a matter of consequence, no legal relationship exists between KfW and our company, our Joint Venture or our Subcontractors under the Contract. The PEA retains exclusive responsibility for the preparation and implementation of the Tender Process and the performance of the Contract.

2. We hereby certify that neither we nor any of our board members or legal representatives nor any other member of our Joint Venture including Subcontractors under the Contract are in any of the following situations:
 - 2.1) being bankrupt, wound up or ceasing our activities, having our activities administered by courts, having entered into receivership, reorganisation or being in any analogous situation;

 - 2.2) convicted by a final judgement or a final administrative decision or subject to financial sanctions by the United Nations, the European Union or Germany for involvement in a criminal organisation, money laundering, terrorist-related offences, child labour or trafficking in human beings; this criterion of exclusion is also applicable to legal persons, whose majority of shares are held or factually controlled by natural or legal persons which themselves are subject to such convictions or sanctions;

 - 2.3) having been convicted by a final court decision or a final administrative decision by a court, the European Union, national authorities in the Partner Country or in Germany for Sanctionable Practice in connection with a Tender Process or the performance of a Contract or for an irregularity affecting the EU's financial interests (*in the event of such a conviction, the Applicant or Bidder shall attach to this Declaration of Undertaking supporting information showing that this conviction is not relevant in the context of this Contract and that adequate compliance measures have been taken in reaction*);

 - 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 such 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 applicable fiscal obligations regarding payments of taxes either in the country where we are constituted or the PEA's country;

2.6) being subject to an exclusion decision of the World Bank or any other multilateral development bank and being listed on the website <http://www.worldbank.org/debarr> or respectively on the relevant list of any other multilateral development bank (*in the event of such exclusion, the Applicant or Bidder shall attach to this Declaration of Undertaking supporting information showing that this exclusion is not relevant in the context of this Contract and that adequate compliance measures have been taken in reaction*); or

2.7) being guilty of misrepresentation in supplying the information required as a condition of participation in the Tender.

3. I/We hereby certify that neither we, nor any of the members of our Joint Venture or any of our Subcontractors under the Contract are in any of the following situations of conflict of interest:

3.1) being an affiliate controlled by the PEA or a shareholder controlling the PEA, unless the stemming conflict of interest has been brought to the attention of KfW and resolved to its satisfaction;

3.2) having a business or family relationship with a PEA's staff involved in the Tender Process or the supervision of the resulting Contract, unless the stemming conflict of interest has been brought to the attention of KfW and resolved to its satisfaction;

3.3) being controlled by or controlling another Applicant or Bidder, or being under common control with another Applicant or Bidder, or receiving from or granting subsidies directly or indirectly to another Applicant or Bidder, having the same legal representative as another Applicant or Bidder, maintaining direct or indirect contacts with another Applicant or Bidder which allows us to have or give access to information contained in the respective Applications or Offers, influencing them or influencing decisions of the PEA;

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 PEA;

3.5) in the case of procurement of Works, Plant or Goods:

- i. having prepared or having been associated with a Person who prepared specifications, drawings, calculations and other documentation to be used in the Tender Process of this Contract;
- ii. 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 compete in a Tender Process, we certify that we have legal and financial autonomy and that we operate under commercial laws and regulations.

5. I/We undertake to bring to the attention of the PEA, which will inform KfW, any change in situation with regard to points 2 to 4 here above.

6. In the context of the Tender Process and performance of the corresponding Contract:

6.1) neither we nor any of the members of our Joint Venture nor any of our Subcontractors under the Contract have engaged or will engage in any Sanctionable Practice during the Tender Process and in the case of being awarded a Contract will engage in any Sanctionable Practice during the performance of the Contract;

6.2) neither we nor any of the members of our Joint Venture or any of our Subcontractors under the Contract shall acquire or supply any equipment nor operate in any sectors under an embargo of the United Nations, the European Union or Germany; and

6.3) we commit ourselves to complying with and ensuring that our Subcontractors and major suppliers under the Contract comply with international environmental and labour standards, consistent with laws and regulations applicable in the country of implementation of the Contract and the fundamental conventions of the International Labour Organisation² (ILO) and international environmental treaties. Moreover, we shall implement environmental and social risks mitigation measures when specified in the relevant environmental and social management plans or other similar documents provided by the PEA and, in any case, implement measures to prevent sexual exploitation and abuse and gender based violence.

7. In the case of being awarded a Contract, we, as well as all members of our Joint Venture partners and Subcontractors under the Contract will, (i) upon request, provide information relating to the Tender Process and the performance of the Contract and (ii) permit the PEA and KfW or an agent appointed by either of them, and in the case of financing by the European Union also to European institutions having competence under European Union law, to inspect the respective accounts, records and documents, to permit on-the-spot checks and to ensure access to sites and the respective project.
8. In the case of being awarded a Contract, we, as well as all our Joint Venture partners and Subcontractors under the Contract undertake to preserve above mentioned records and documents in accordance with applicable law, but in any case for at least six years from the date of fulfilment or termination of the Contract. Our financial transactions and financial statements shall be subject to auditing procedures in accordance with applicable law. Furthermore, we accept that our data (including personal data) generated in connection with the preparation and implementation of the Tender Process and the performance of the Contract are stored and processed according to the applicable law by the PEA and KfW.

Name: _____ In the capacity of: _____

Duly empowered to sign in the name and on behalf of³: _____

Signature: Dated:

² In case ILO conventions have not been fully ratified or implemented in the Employer's country the Applicant/Bidder/Contractor shall, to the satisfaction of the Employer and KfW, propose and implement appropriate measures in the spirit of the said ILO conventions with respect to a) workers grievances on working conditions and terms of employment, b) child labour, c) forced labour, d) worker's organisations and e) non-discrimination.

³ In the case of a JV, insert the name of the JV. The person who will sign the application, bid or proposal on behalf of the Applicant/Bidder shall attach a power of attorney from the Applicant/Bidder.

Annex E
Model for Financial Proposal – Cost Break-down

SUMMARY	Amount (EUR)
1. – Foreign personnel	
2. – Allowances for foreign staff	
3. – Local personnel	
Sub-Total – Staff cost	
4. - Local transport	
5. – Project office	
6. – Reports and documents	
7. – International travel cost	
Sub-Total Logistics (transport, project office, reports and documents)	
8. - Equipment cost	
9. - Miscellaneous cost	
Total – Other cost	
Grand total	

1. Foreign personnel	Unit	Quantity	Unit Rate (EUR)	Amount (EUR)
1.1 Team Leader	month	...		
1.2 NN	month	...		
1.3 ...	month	...		
1.4 ...	month	...		
Sub-total Foreign personnel				
2. Allowance, accommodation, complimentary travel cost for foreign personnel				
2.1 Allowance & Accommodation - Long-term staff	Month	...		
2.2 Allowance & Accommodation - Short-term staff	Month	...		
Sub-total Allowance and accommodation				
3. Local personnel (incl. allowances and accommodation)				
3.1 NN	Month	...		
3.2 ...	Month	...		
3.2 ...	Month	...		
Sub-total Local personnel				
4. Local transport				
4.1 Vehicle lease/rent or use of own vehicles	Month	...		
4.2 Vehicle O&M incl. driver, assurance, repairs	Month	...		
4.3 Other local transport (short-term, peak)	Day	...		
4.4 Local flights	Flight	...		
Sub-total Local transport				

Annex E

5. Project office				
5.1 Office rent	Month	...		
5.2 Office operation	Month	...		
Sub-total Project office				
6. Reports and documents				
6.1 ... (Type of reports/documents to be stated)	rep./doc.	...		
6.2 ...	...	...
6.3 ...	...	...
6. ...	...	...
Sub-total Reports and documents				
7. International travel				
7.1 International return flights	Flight	...		
7.2 Complimentary travel costs	Flight	...		
7.3 other international flights	Flight	...		
Sub-Total Int. flights - Reimbursable				
8. Equipment				
8.1 ..	...	...
8... other. equip. to be handed over/consumed	...	...
Sub-Total Total Equipment				
9. Miscellaneous and optional items/services				
9.1 ...	...	...
9... other miscellaneous items/services	...			
9... miscellaneous budget/contingencies	...	...
Sub-Total Total Miscellaneous items/services				

Annex F
Evaluation Criteria

Evaluation criteria and sub-criteria of the tender		Maximum points
1	Concept and methodology	55
1.1	Clarity and completeness of the tender	5
1.1.1	Clarity	2
1.1.2	Form	1
1.1.3	Integrity (check-list) (compliance with requirements)	2
1.2	Critical analysis of the project objectives and the TOR	15
1.3	Proposed concepts and methods	35
1.3.1	Concept and approach for establishing and implementing the CBF Communications, Outreach and Marketing Strategy	20
1.3.2	Concept and methods on the design and implementation of communications tools and products	10
1.3.3	Proposed initial work plan for the consultancy (activity plan including staff schedule if subcontracting)	5
2	Qualifications and Experience of the proposed staff	45
2.1	Communications Specialist	
2.1.1	Educational level (higher education preferred)	4
2.1.2	Overall Professional experience (min. 7 years) relevance	5
2.1.3	Experience working with Conservation Trust Funds	5
2.1.4	Experience managing and developing communications content using different kinds of communication platforms, including website and social media platforms;	5
2.1.5	Experience with media and public press relations	5
2.1.5	Experience working in partnership approach	5
2.1.6	Experience designing and organizing events	5
2.1.7	English, Spanish and French Knowledge	5
2.1.8	Regional Experience (insular Caribbean, other Small Island Developing States -SIDS, Latin America)	5
2.1.9	Experience with the German financial cooperation or similar institutions	1
	Total	100