



**Tender Document  
for  
Monitoring, Evaluation and Learning (MEL) Specialist**



## TERMS OF REFERENCE

### **EbA Monitoring, Evaluation and Learning (MEL) Specialist**

The Caribbean Biodiversity Fund (CBF) is inviting qualified individuals to submit their technical and financial proposals for the “EbA Monitoring, Evaluation and Learning (MEL) Specialist” consultancy bidding process. This consultancy’s main objective is to improve MEL activities among grantee organisations implementing Ecosystem-based Adaptation (EbA) to climate change projects in eleven Caribbean Island states and refine the overarching EbA Facility MEL plan.

#### **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 USD75 million endowment fund and (ii) a Climate Change Program, focused on Ecosystem-based Adaptation (EbA), with a USD50 million sinking fund. In addition to the current operations, the CBF continues to pursue new opportunities. In 2022, 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 Nature Conservancy (TNC), and the Global Environment Facility (GEF) — through the World Bank and the United Nations Development Program (UNDP).

Under the *Climate Change Program*, and through the 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.

To date, a total of 18 million USD was committed to the implementation of the 17 projects under the first two calls for proposals, with another 4 million USD in the pipeline for approved projects. This will increase with subsequent calls for proposals to potentially up to 45 projects. A 3<sup>rd</sup> Call for Proposals (CfPs) is currently under way with a total of four CfPs planned. Targeted countries under this program currently include Antigua & Barbuda, Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Montserrat, Saint Lucia, and Saint Vincent & the Grenadines. The Bahamas, Barbados, Saint Kitts and Nevis, and Trinidad and Tobago may also benefit through regional projects.

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

## **2. OBJECTIVE OF THE CONSULTANCY**

This consultancy's main objective is to improve MEL plans among grantee organisations implementing Ecosystem-based Adaptation (EbA) to climate change projects in eleven Caribbean Island states and refine the overarching EbA Facility MEL plan to ensure KfW/IKI indicators are adequately covered. In collaboration with EbA Program staff the Consultant will conduct a critical review of the EbA Facility MEL Plan and recommend improvements that aligns grantee MEL activities to indicators and targets of the EbA Facility and ensure that IKI standard indicators are reflected and reported on.

## **3. AVAILABLE DOCUMENTS**

CBF will share available documentation with the selected consultant, comprising, but not limited to:

- Operational Manual of the CBF EbA Facility, including its current MEL plan;
- Approved project documents of 19 EbA 1<sup>st</sup> and 2<sup>nd</sup> CfP grantee projects, including their proposed MEL plan and current annual work plans;
- Technical and financial progress reports of 11 grantees under the 1<sup>st</sup> Call for Proposals (CfP);
- IKI/KfW logical framework for the EbA Facility
- Any other relevant EbA MEL Plan documentation as needed.

A CBF confidentiality agreement will be signed as part of the contract.

## **4. SCOPE OF WORK**

The consultancy is envisaged as a desk study from the consultant's home office with virtual meetings with grantees, and the EbA Facility Program team as required. The Consultant will report to the Program Manager of the EbA Facility. The Consultant will also work closely with other CBF staff and stakeholders as required, most notably the Technical and Program Officers of the EbA Facility, the project managers of 18 EbA Facility 1<sup>st</sup> and 2<sup>nd</sup> CfP grantee organizations.

The consultant is expected to perform the following duties and tasks:

### **Task 1: Familiarization desk study and inception meeting**

- Become familiar with the work, log frame, overarching MEL Plan and Operational Manual of the EbA Facility;
- Discuss work plan in an inception meeting with the EbA team.

## **Task 2: Review and Refine Grantee MEL Activities**

- Review the current MEL plans of nineteen EbA Facility grantees under the 1<sup>st</sup> and 2<sup>nd</sup> CfP to identify strengths and weaknesses;
- Review of existing documentation including, but not limited to: semi-annual technical and financial progress reports, 1<sup>st</sup> CfP grantee project work plans, and the EbA Facility logical framework;
- Conduct virtual interviews with relevant staff of 11 1<sup>st</sup> CfP grantee organizations, and where applicable their stakeholders or partners, on aspects including, but not limited to, baseline data, data collection methodology, data sources in the project management cycle and qualitative learning of grantee MEL activities
- Identify gaps in MEL plans of 11 EbA Projects such as monitoring and evaluation management capacity, or MEL resource allocations and recommend improvements to MEL capabilities of grantee projects.
- In coordination with the grantee project managers of the 1<sup>st</sup> CfP, refine each of the eleven grantee MEL plans to suit their MEL needs as well as those of the CBF EbA Facility. It should be noted that grantees cannot be obliged to expand their MEL activities beyond what is scheduled in the approved project proposal, which forms part of the grant agreements, but are encouraged to elaborate and adapt them as part of their annual work planning. This should result in updated indicators, their definition, monitoring frequency and methodology, as well as quantitative baseline, mid-term and end-of-project targets, and should adequately cover the monitoring of risks identified in the risk log;
- Produce a succinct summary report of findings related to grantee MEL, together with an outline of how the identified weaknesses have been addressed by the consultancy as well as lessons learnt for future EbA Facility MEL plans and reporting on the EbA Facility Logical Framework.

### **Deliverables Tasks 1 & 2:**

- **Critical Situation Analysis of 1<sup>st</sup> and 2<sup>nd</sup> CfP Grantee MEL activities**
- **11 1<sup>st</sup> CfP Updated Project MEL Plans**
- **Presentation of results to the CBF**
- **Grantee workshop/webinar presentation on Monitoring Evaluation and Learning with the main objective to provide grantees with the necessary tools to overcome MEL deficiencies that were identified in the Critical Situation Analysis**

## **Task 3: Refine the EbA Facility MEL Plan**

- Review EbA Facility MEL Plan assessing overall alignment of provisions to delivering quality data on the 17 Indicators. This would include an assessment of the current standards of measurement, data collection and responsibilities of grantees and the EbA Facility Program team to ensure KfW/IKI indicators are adequately included.
- Collaborate with the EbA Facility team to develop guidelines to be used to carry out activities of the EbA MEL Plan by grantees and CBF staff. This may include ecosystem specific measures, key tools and guidelines, as well as methods for gathering qualitative feedback such as community insights.
- Review and update formats, definitions and templates used in EbA Facility MEL activities

ensuring alignment with donor reporting requirements and consistency across documentation used to develop targets, report on MEL progress and evaluate overall program activities.

- Review and update the MEL section of the EbA Facility Operations Manual to ensure consistent collection and reporting on Indicator targets via recommended EbA Facility project management cycle templates;
- Assess the EbA MEL Plan in relation to the EbA Facility Logical Framework and synergies with other EbA Regional and National Projects, updating either document as appropriate and making recommendations for additional MEL data sources or reporting as necessary.

### **Deliverables Task 3:**

- **Updated EbA MEL Section of EbA Facility Operations Manual**
- **Guidelines of tools and best practices for grantee EbA Facility MEL activities**

## **5. SCHEDULE AND DURATION OF ASSIGNMENT**

The Assignment is expected to commence on **Tuesday, March 1<sup>st</sup>, 2022** and last through June 2022. The estimated effort by task described below shows an indication of the number of days required for each task, which shall be distributed during the consultancy period. The Consultant shall provide an analysis of the time requirements in the technical proposal.

### **Estimated effort**

<b>Task</b>	<b>Time Input (days)</b>
<b>Task 1: Familiarization desk study and inception meeting</b>	<b>3</b>
<b>Task 2: Review and Refinement of Grantee MEL plans</b>	<b>47</b>
<b>Task 3: Refine the EbA Facility MEL System</b>	<b>30</b>
<b>Total input</b>	<b>80</b>

## **6. REQUIRED EXPERTISE FOR THE ASSIGNMENT**

The consultant shall have the following expertise:

- A post-graduate degree in impact evaluation for international development, environmental and/or social impact assessment, sustainable development, environmental science, natural resources management, climate change, planning or related discipline;
- A minimum of eight years of demonstrable experience related to monitoring, evaluation and learning (MEL). Experience with KfW and/or the International Climate Initiative (IKI) projects is an asset;
- At least four years of experience in reviewing and evaluating climate change adaptation projects, including target setting and GHG emission calculations;
- At least four years of experience working in quantifying carbon sequestration / GHG emission reduction equivalent

- Knowledge and understanding of EbA issues in coastal/marine ecosystems and communities;
- Exemplary verbal and written skills in English. Advanced Spanish and/or French knowledge (conversational and reading) would be an asset;
- Excellent interpersonal and communication skills (oral and written) and ability to interact successfully with diverse stakeholder groups and organizations;
- Be a well-organized individual with an eye for detail.
- Experience within a remote working team environment
- Experience with coastal communities in insular Caribbean would be an asset.

## 7. TENDER EVALUATION

### General

The selection of the consultant for the execution of the required services will be made in accordance with the CBF procurement guidelines and follow the Quality and Cost-Based selection method. The two-envelope submission applies, but will be achieved by electronic submission in separate e-mails, as described below.

### Technical and Financial Proposals

Applicants shall submit the Technical and Financial Proposals according to the instructions detailed in Section 8 below. The quality of each technical proposal will be evaluated on a scale of 0 to 100 points, according to the criteria given in Annex A, which will be examined in accordance with the requirements as indicated in the Terms of Reference. If there are 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.

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

### 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.

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.

### **Consulting Contract**

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

### **8. HOW TO APPLY?**

Applicants shall submit the Technical and Financial Proposals addressing the overall concepts and methodologies to attain the work's objectives (see Section 2), the specific tasks (see Section 4), and addressing the evaluation areas contained in the evaluation criteria (see Annex A).

**The Technical Proposals** shall be submitted via e-mail to the following address: [secretariat@caribbeanbiodiversityfund.org](mailto:secretariat@caribbeanbiodiversityfund.org) with Subject Line: "Technical Proposal – EbA Monitoring, Evaluation and Learning (MEL) Specialist".

The following documents shall be submitted as part of the technical proposal:

1. Proposed workplan;
2. Curriculum vitae;
3. Covering letter describing;
  - a. Key work, including how experience relates to the consultancy objectives and expected tasks;
  - b. Statement of availability for tasks delivery (time %);
4. One sample of relevant work led by the applicant;
5. Names and contact details of three referees.

**The Financial Proposals** shall be submitted via e-mail to the following address: [secretariat@caribbeanbiodiversityfund.org](mailto:secretariat@caribbeanbiodiversityfund.org) with Subject Line: "Financial Proposal – EbA Monitoring, Evaluation and Learning (MEL) Specialist".

Applications shall be submitted by **Monday, January 31<sup>st</sup>, 2022**, 11:59 PM USEST. Late submissions will be automatically eliminated. The language of the Technical and Financial Proposals and of all communication with CBF shall be English. The currency of the Financial Proposal shall be USD.

Questions may be submitted by **Friday, January 14<sup>th</sup>, 2022** via e-mail to the following address: [secretariat@caribbeanbiodiversityfund.org](mailto:secretariat@caribbeanbiodiversityfund.org) with Subject Line: "Questions Monitoring, Evaluation and Learning (MEL) Specialist".

If necessary, the CBF will be involved and answer at the latest **10 days (Friday, January 21<sup>st</sup>, 2022) before the submission deadline.**

## Annex A

### Technical Evaluation Criteria

Evaluation criteria and sub-criteria of the tender		Maximum points
<b>A</b>	<b>CONCEPT AND METHODOLOGY</b>	<b>52</b>
<b>1</b>	<b>Clarity and completeness of the tender</b>	<b>4</b>
1.1	Organization: clarity and form	2
1.2	Integrity (check-list) (compliance with requirements)	2
<b>2</b>	<b>Critical analysis of the project objectives and the TOR</b>	<b>14</b>
<b>3</b>	<b>Proposed concepts and methods</b>	<b>34</b>
3.1	Concept and approach on reviewing and updating the EbA Facility MEL framework	20
3.2	Concept and approach on reviewing and updating grantee MEL frameworks	10
3.3	Proposed agenda/work plan for the consultancy	4
<b>B</b>	<b>QUALIFICATIONS AND EXPERIENCE OF THE PROPOSED STAFF</b>	<b>48</b>
<b>4</b>	<b>Experience</b>	<b>22</b>
4.1	MEL experience	8
4.2	CCA evaluation and target setting	5
4.3	Quantification of carbon sequestration / GHG emission reduction equivalent	5
4.4	Remote working	3
4.5	Experience with coastal communities in insular Caribbean	1
<b>5</b>	<b>Education</b>	<b>7</b>
5.1	Relevant post-graduate degree	7
<b>6</b>	<b>Other Skills</b>	<b>14</b>
6.1	Familiarity with EbA issues in coastal/marine ecosystems and communities	5
6.2	English knowledge	3
6.3	Spanish and French knowledge	1
6.4	Interpersonal and communication skills	5
<b>7</b>	<b>Work sample</b>	<b>5</b>
	<b>Total</b>	<b>100</b>