

**Tender Document
for
Caribbean Conservation Trust Fund Network Development
Consultant**



TERMS OF REFERENCE

Caribbean Conservation Trust Fund (CTF) Network Consultant

The Caribbean Biodiversity Fund (CBF) is inviting qualified individuals to submit their technical and financial proposals for the “Caribbean Conservation Trust Fund Network Development Consultant” consultancy bidding process. The objective of the Caribbean Conservation Trust Fund Network Development Consultancy is to develop the governance structure and membership recruitment strategy for a Caribbean network of conservation trust funds, environmental and women’s rights organizations, as well as other regional environmental actors.

Led by the CBF and partner NCTFs which make up the Caribbean Sustainable Finance Architecture, this network will facilitate knowledge exchange and act as a learning hub to accelerate the sustainable financing of innovative, inclusive and gender responsive solutions for people and nature.

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 three programs: (i) a Conservation Finance Program, anchored by a US\$98 million endowment fund, (ii) a Climate Change Program, focused on Ecosystem-based Adaptation (EbA), with a US\$60 million sinking fund and (iii) a Nature Based Economies Program focused on Circular Economy (ACE) Facility with a US\$ 25 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 10 active signed Partnership Agreements. 9 out of 10 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 2024 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 NCTFs grantees which can include

government, NGOs, small private associations (of fisherfolk and farmers for example), and research and academic institutions.

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.

Caribbean Organizations for Resilience and Environment (CORE) Project:

Under the Conservation Finance Programme, the Caribbean Organizations for a Resilient Environment (CORE) project aims to increase resilience to climate change of vulnerable groups in 8 beneficiary countries across the Caribbean: Belize, Dominica, Grenada, Guyana, Jamaica, St. Lucia, St. Vincent and the Grenadines, and Suriname.

CORE is designed for both on-the-ground activities to ensure positive impacts in tackling biodiversity loss and climate change effects and mainstreaming inclusive gender responsive (IGR) approaches in the Caribbean. The CORE project is being implemented by the CBF and is financed by the Global Affairs Canada (GAC), with co-financing from the CBF.

The final beneficiaries of the CORE project will be 8 National Conservation Trust Funds in CORE target countries and will involve the participation of Environmental and Women's Rights Organisations (EWROs) working in gender mainstreaming, communities, and other actors in the region working in biodiversity conservation and ecosystem-based adaptation. *See Annex B for the NCTF listing.*

The CORE project consists of the following key outcomes:

1. **Intermediate outcome 1:** Improved performance of National Conservation Trust Funds (NCTFs) and environmental and women-rights organizations (EWROs) to protect biodiversity and promote climate change resilience for vulnerable and marginalized local communities, particularly for women

Immediate outcomes:

- a. Increased capacity of NCTFs to implement inclusive and gender-responsive (IGR) nature-based climate solutions (NbCs) to protect biodiversity conservation and promote climate change resilience programming in the Caribbean, particularly for women
- b. Increased knowledge and skills of EWROs receiving NCTFs funding to design and implement IGR NbCS initiatives to protect biodiversity conservation and climate change resilience

2. **Intermediate outcome 2:** Enhanced viability of regional EWROs and conservation trust funds to expand the CSFA in support of inclusive and gender-responsive climate resilience in communities and conservation areas.

Immediate outcome:

- a. Improved knowledge and skills of CBF, NCTFs and regional EWROs to design sustainable, IGR financial mechanisms (FMs) that increase access of women to biodiversity and climate funds.

3. **Intermediate outcome 3:** Increased effectiveness of NCTFs and target Caribbean countries to advance agendas for the sustainable, inclusive, and equitable protection and gender responsive management of biodiversity conservation and climate resilience across the Caribbean.

Immediate outcome:

- a. Enhanced capacity of CTFs to coordinate agendas across the Caribbean for the sustainable, inclusive, and equitable protection and gender responsive management of biodiversity conservation and climate resilience.

Other CBF Conservation Finance Projects:

Caribbean Regional Architecture for Biodiversity (CRAB) - Under other projects being implemented by the Conservation Finance Programme, actions have been identified to potentially support the network of NCTFs. For example the CRAB project funded by the AFD there will be a consultancy to identify a regional financing mechanism for biodiversity conservation. The objective of this consultancy is to prepare a road map and action plan for the mobilization of additional and sustainable financing for conservation on a regional level.

This will be undertaken by (i) Conducting an evaluation, involving national funds, public and private resources that are likely to be mobilized at the regional level for the financing of conservation and their prioritization and (ii) Feasibility study and preparation of at least a roadmap for the mobilization of additional funding and potential new financial mechanisms prioritized during the evaluation, that specify the terms of involvement and initiative of national funds in fundraising at the regional level. Resources have also been identified to support the implementation of this road map.

To provide sustainability to the work of CRAB the project will contribute to ensuring the Caribbean Sustainable Finance Architecture has a strategic tool to plan interventions according to the priorities defined in the regional approaches and the international agenda.

USAID Sustainable Financing for Caribbean Regional Conservation Program - In the USAID project a critical component of implementation would facilitate the provision of institutional and regional capacity support in the continued development and consolidation of NCTFs and other relevant organizations with a focus on impact grantmaking and tailor made tool kits. The project will create a network of Trust Funds sharing ideas and material for continuous development of best practices and influencing regional policy for biodiversity conservation and increasing climate resilience. Building upon the existing network of CSFA, as well as the network support under the CORE project, a consultant will be hired for undertaking this task and will be engaging and conducting interviews with the different CTFs. Key to developing this network would be conducting interviews, drawing from lessons learned from other regional CTFs and regional networks, and internal discussions within CBF to align with other conservation finance projects.

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

2. OBJECTIVE OF THE CONSULTANCY

The objective of the Caribbean Conservation Trust Fund Network Development Consultancy is to develop the governance structure and membership recruitment strategy for a Caribbean network of conservation trust funds, environmental and women's rights organizations, as well as other regional environmental actors. Led by the CBF and partner NCTFs which make up the Caribbean Sustainable Finance Architecture (CSFA), this network will facilitate dialogue, knowledge exchange and act as a learning hub to accelerate the sustainable financing of innovative, inclusive and gender responsive biodiversity conservation and climate change resilience. solutions for people and nature. The Network will deliver outputs related to the capacity of regional Conservation Trust Funds to coordinate agendas and share best practices in collaboration with local stakeholders.

The development of a Caribbean Conservation Trust Fund Network will take into consideration ongoing efforts by CBF and Partner NCTFs within the CSFA to develop a consortium to advance areas of common interest for their partnership with the CBF. This consultancy will establish opportunities for NCTFs with CBF Partnership Agreements plus CTFs in Belize and Suriname, to initiate channels for liaison on the direction on the network to be established. The maximum budget for this consultancy is USD 30,000.00

3. AVAILABLE DOCUMENTS

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

- CBF CORE Project Documents
- Approved Logical Framework and Indicator Targets for the CBF CORE project
- CBF CORE Communication and Visibility Strategy
- CBF and NCTF organizational documents required to conduct the assessment
- Documents related to other CBF Programs and Projects as required
- Relevant policies and publications recommended by the CBF
- Any other CBF Conservation Finance Program documentation as needed.

4. SCOPE OF WORK

The Caribbean Conservation Trust Fund Network Development Consultancy will develop a robust framework for regional collaboration, focusing on Conservation Trust Funds and integrating Environmental and Women's Rights Organizations, among others. The assignment will deliver a comprehensive action plan, detailing optimal governance structures, membership strategies, and ensure the operationalization of an inclusive and gender-responsive network for climate resilience and biodiversity conservation in the Caribbean. The consultancy is envisaged as a desk study from the consultant's home office with virtual meetings and support to NCTFs and the CBF. The Consultant will report to the CORE Technical Officer. The consultant is expected to perform the following duties and tasks:

Task 1: Familiarization, desk study and Inception Report

- Become familiar with the Caribbean Biodiversity Fund and the Caribbean Sustainable Finance Architecture including National Conservation Trust Funds (NCTFs)
- Review existing literature on regional networks of conservation trust funds
- Identify synergies with CBF Programs and Projects related to networking and knowledge exchange for regional conservation and climate resilience projects
- Develop a revised work plan to conduct the tasks as laid out in this TOR
- Inception Meeting with the CBF Secretariat to discuss consultancy implementation

Deliverables Task 1:

- Inception Report outlining approach and work plan of the consultant.

Task 2: Participatory Development of the optimal Governance and Membership Structure

- Understand current status of NCTF-led networking efforts and opportunities to scale
- Conduct virtual meetings and interviews with NCTFs and CBF Secretariat as needed to deliver the assignment
- Analyze current membership structures and governance of similar networks.
- Hold consultations with key stakeholders, including representatives of CBF, NCTFs, donors, and other relevant organizations.
- Facilitate workshops and meetings to gather input from stakeholders on the proposed membership structure, engagement process, organizational structure, and strategic outlook of the Caribbean Conservation Trust Fund Network.
- Design a membership engagement process for environmental funds and organizations including a transparent and inclusive process for membership application and approval.
- Develop a strategic approach for recruiting diverse members including conservation, environmental, and women's rights organizations.
- Design a governance framework for the Caribbean Conservation Trust Fund Network.
- Establish protocols for effective operation within the Caribbean Sustainable Finance

Architecture.

- Develop as necessary any material needed to survey input from project stakeholders and beneficiaries
- Present to the NCTFs and CBF a summary of the draft Operational Plan for the Caribbean Conservation Trust Fund Network.
 - Content of the operational plan would at least include: Purpose, Mission, Vision, Main Objectives, Principles, Membership, Network Structure, Executive Leadership, Meetings and Decision Rules, Roles and Responsibilities of Members, Key Offices and Committees.

Deliverables Task 2:

- Presentation of the Draft Caribbean Conservation Trust Fund Network Operations Plan
- Caribbean Conservation Trust Fund Network Operations Plan including a comprehensive governance framework and membership recruitment strategy.

Task 3: Delivery of the Action Plan to support the Caribbean Conservation Trust Fund Network

- Propose mechanisms to integrate gender equality and women's empowerment into network activities.
- Design the Action Plan for a learning hub to collect educational resources and training sessions on gender equality, climate resilience and biodiversity conservation.
- Recommend mechanisms for sustainable financing of the Caribbean Conservation Trust Fund Network
- Costed Action Plan for operation of the CTF Network
- Propose alliances with diverse sectors, including environmental and women's rights organizations.
- Set out a clear, actionable plan for Caribbean Conservation Trust Fund Network's growth and outreach activities described in the CORE Project Document
 - Action Plan content would at least include: Strategic Approach, Leadership and Management, Programs and Activities, Communication and Engagement, Monitoring and Evaluation, Operational Budget, and Fundraising and Financial Sustainability

Deliverables Task 3:

- An Action Plan for the Launch of the Caribbean Conservation Trust Fund Network including a sustainable financing plan for key activities of the Network
- Present a summary of the consultancy deliverables to the CBF Board of Directors and Secretariat
- A summary close-out report including lessons learned in delivery of the assignment.

SCHEDULE AND DURATION OF ASSIGNMENT

The Assignment is expected to commence in July 2024 and be completed by September 2024. 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

Task	Time Input (working days)
Task 1: <u>Familiarization, desk study and Inception Report</u> <i>Two weeks after contract signing</i>	8
Task 2: <u>Participatory Development of the optimal Governance and Membership Structure</u> <i>Eight weeks after contract signing</i>	20
Task 3: <u>Delivery of the Action Plan to launch the Secretariat of the Caribbean Conservation Trust Fund Network</u> <i>Twelve weeks after contract signing</i>	12
Total input	40

6. REQUIRED EXPERTISE FOR THE ASSIGNMENT

The consultant shall have the following criteria:

- A postgraduate degree in business management, sustainable development, environmental studies or equivalent.
- A minimum of 7 years of demonstrated knowledge on conservation networks, governance and management.
- Thorough understanding of Organizational Development and Strategic Planning.
- Previous experience with working with Regional Conservation Trust Fund or Civil Society Networks would be a distinct advantage.
- Experience in environmental programme management, strategy development and governance in the Caribbean Region.
- Exemplary writing skills in English.
- Experience within a remote working team environment

7. HOW TO APPLY?

This call is open to individuals only. Applicants shall submit applications via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line:

“Proposal - Caribbean Conservation Trust Fund Network Development Consultant” 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 budget available for this contract is USD 30,000.

The following documents shall be submitted as part of the application:

1. Proposed work plan including delivery timelines;
2. Proposed financial budget to execute the consultancy.
3. Curriculum vitae;
4. Cover letter describing;
 - a. Key work, including how experience relates to the consultancy objectives and expected tasks;
5. One written sample of related work
6. Names and contact details of three referees.

Selection Process:

1. A compliance check for documents listed in above will be conducted
2. All complete applications will be reviewed by a Selection Committee against the evaluation matrix found below.
3. The CBF will contact the top candidate and negotiate terms for signing the consulting contract.

Consulting Contract

The Proposal 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.

Application Deadlines:

Applications shall be submitted by **Friday, 14th June, 2024 at 11:59PM US EST**. Late submissions will be automatically eliminated. The language of the Proposal and of all communication with CBF shall be English. The currency of the Proposal shall be USD.

Questions may be submitted by **Wednesday, 29th May, 2024** via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line: “Question: National Conservation Trust Fund (NCTF) Good Governance Practice Assessment Consultant”.

If necessary, the CBF will be involved and answer at the latest **10 days (Monday, 3rd June, 2024) before the submission deadline**.

Annex A

Technical Evaluation Criteria

Evaluation criteria and sub-criteria of the tender		Maximum points
A	CONCEPT AND METHODOLOGY	48
1	Clarity and completeness of the tender	4
1.1	Organization: clarity and form	2
1.2	Integrity (check-list) (compliance with requirements)	2
2	Critical analysis of the project objectives and the TOR	14
3	Proposed concepts and methods	30
3.1	Concept and approach on developing the Caribbean CTF Network	25
3.2	Proposed Work plan for delivery of the full assignment	5
B	QUALIFICATIONS AND EXPERIENCE OF THE CONTRACTOR	52
4	Experience	40
4.1	Demonstrated knowledge on conservation networks, governance and management	25
4.2	Experience with organizational development and strategic planning	15
5	Education	5
5.1	Relevant post-graduate degree	5
6	Writing Sample	7
	Total	100

Annex B

National Conservation Trust Funds (NCTFs)

National Conservation Trust Fund (NCTF)	Country	Partnership agreement signature
Bahamas Protected Areas Fund (BPAF)	The Bahamas	November 2020
Dominica National Conservation Trust Fund (DNCTF)	Dominica	Dec 2022
Fondo Nacional para el Medio Ambiente y Recursos Naturales (National Fund for the Environment and Natural Resources) (FONDO MARENA)	Dominican Republic	December 2016 and April 2022
Grenada Sustainable Development Trust Fund (GSDTF)	Grenada	June 2019
Guyana Protected Areas Trust (PAT)	Guyana	May 2022
Haiti Biodiversity Fund (FHB)	Haiti	November 2020
National Conservation Trust Fund of Jamaica (NCTFJ)	Jamaica	June 2019
St. Christopher and Nevis Conservation Foundation (SCNCF)	St Christopher and Nevis	October 2020
Saint Lucia National Conservation Fund (SLUNCF)	St. Lucia	June 2017 and Feb 2023
Saint Vincent and the Grenadines Conservation Fund (SVGCF)	St. Vincent and the Grenadines	March 2019
Belize Protected Area Conservation Trust Fund (PACT)	Belize	CORE Project Partnership
To Be Confirmed	Suriname	CORE Project Partnership