



Terms of Reference

Consultancy: Sustainability of Circular Economy Projects - Caribbean Biodiversity Fund (CBF) Advancing Circular Economy (ACE) Facility

July 2024

Position title:	Project Development and Sustainability Consultant, ACE Facility
Location:	Flexible within the Caribbean (Remote)

I. INTRODUCTION & BACKGROUND

The CBF is a regional environmental fund whose mission is to ensure continuous funding for **conservation and sustainable development in the Caribbean**. Established in 2012, the CBF was designed to accommodate the receipt, investment, distribution, and monitoring of conservation funding throughout the region.

The CBF has a flexible structure to implement innovative solutions for resource mobilization at the regional level through a range of financial instruments. Currently, the CBF manages a total of USD 175 million, including a USD 95 million endowment in its Conservation Finance Program, which aims to support 14 countries across the region; a USD 60 million sinking fund for Ecosystem-based Adaptation (EbA) Facility, which anchors the CBF's Climate Change Program; and a USD 28 million sinking fund for the **ACE Facility, which anchors the Nature-Based Economies Program**.

The ACE Facility was developed to contribute to the reduction of marine pollution in the Caribbean through the promotion of sustainable circular economy interventions. The Facility will **award grants through a competitive call for proposals** process to finance and provide technical support to projects with a sustainable focus on reducing marine litter or preventing its introduction into the marine environment, improving the framework conditions for a circular economy, and engaging local Caribbean communities in reducing marine pollution.

Key outputs of the ACE Facility are:

1. The ACE Facility, as a **financing mechanism** for circular economy interventions in the Caribbean, is operational.
2. Priority **circular economy measures** that achieve a measurable **reduction of marine litter** have been implemented.
3. **The capacities and awareness of public and private actors** for the circular economy have been strengthened.

The ACE Facility will work with **public and private sector partners** as well as other Caribbean stakeholders such as academia, non-governmental organizations (local and regional), and community-based organizations to fund projects that promote and apply practical **circular economy principles** to minimize or prevent litter from entering the marine environment or remove litter from the marine environment. This is to be achieved by **investments in equipment and infrastructure**, the generation of **data and knowledge**, **policy support**, and **the education of consumers**.

The Facility seeks to bring benefits to the wider Caribbean region with nine (9) primary beneficiary countries: Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Montserrat, St. Lucia, and St. Vincent and the Grenadines. Funding for the ACE Facility is provided by the **German Ministry for Economic Cooperation and Development (BMZ)** through the **KfW Development Bank (KfW)**.

Oversight of the ACE Facility will be a collaboration between the CBF Secretariat and the ACE Facility Committee. The ACE Facility Committee consists of external experts appointed by the CBF Board. Its purpose is to provide overall technical supervision, strategic advice, and guidance to the operations of the ACE Facility.

The ACE Facility Grant Process

Grants will be issued based on a competitive selection approach and the process is outlined below:

- The CBF launches the Call for Proposals.
- CBF receives Concept Notes (CN) and commences the review process for shortlisting as per requirements and guidelines.
- Shortlisted CNs will advance to the project proposal preparation phase and the CBF will request a full proposal and provide support for development (via a max USD 10,000 Project Preparation Grant and ***this Consultancy***).
- The CBF receives the full project proposals and commences the review process.
- Final adjustments to the approved full project proposals and due diligence of institutions before the signing of the agreement are conducted. The grant agreement is signed.

For more information about the Nature-Based Program and its ACE Facility, please visit the CBF website (<https://caribbeanbiodiversityfund.org/our-priorities/nature-based-economies/>).

II. POSITION SUMMARY

The **Caribbean Biodiversity Fund (CBF)** is seeking a qualified individual consultant to work with the ACE Facility Team as the **Project Development and Sustainability Consultant**. The consultant shall have a proven track record in solid waste management, the circular economy, and project management and development to provide technical support to potential grantees on a needs basis to effectively prepare project proposals that meet the requirements of the ACE Facility CfPs. **This position is open to individuals only with flexibility within the Caribbean region.** Consulting firms or consortiums are not eligible. No subcontracting is allowed.

III. OBJECTIVE OF THE CONSULTANCY

The consultancy's main objective is to provide technical assistance and support to potential grantees with shortlisted and approved concept notes with the preparation of their full project proposals. The ACE Facility expects to shortlist a maximum of forty (40) concept notes for the first call for proposals. The consultancy shall ensure that project proposals are sustainable, financially feasible beyond the grant funding period, innovative, impactful, and transformative in accordance with the criteria of the ACE Facility. The maximum budget for this consultancy is USD 48,000.

IV. AVAILABLE DOCUMENTS

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

- CBF's Environmental and Social Management System (ESMS)
- Operational Manual of the CBF ACE Facility
- ACE Facility criteria for potential grantees and project proposal template)
- Strategic Approach of the CBF ACE Facility and Logical Framework
- ACE Facility Monitoring, Evaluation, and Learning (MEL) Framework
- Approved Concept Notes
- CFP documents including the terms and conditions, concept note application template, concept note evaluation criteria, logical framework, full project proposal application template, full project proposal guidelines, and full project proposals evaluation criteria.
- Relevant contact information for potential grantees

V. SCOPE OF WORK

The consultancy is envisaged as remote home-based engagement with virtual meetings with potential grantees¹, including the ACE Facility team, as required. The Consultant will report to the Program Manager of the ACE Facility. The Consultant will also work closely with other CBF staff and stakeholders as needed, most notably the Chief Executive Officer (CEO), Technical Officer, and Program Officer of the ACE Facility.

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

Task 1: Familiarization desk study and inception meeting

- Review of existing documentation including, but not limited to the Facility Strategic Approach, the ACE Facility Operations Manual, the ACE Facility MEL framework; and others listed in section IV.
- Discuss the work plan and structured approach to providing support to potential grantees in an inception meeting with the ACE Facility team.

Deliverable 1: Inception Report (including a work plan and approach to work)

Task 2: Technical assistance and guidance to potential grantees to prepare full project proposals

- Employ a collaborative approach and close engagement with potential grantees to provide guidance concerning project proposal alignment with the accepted concept notes and call for proposal documents.
- Engage with potential grantees to review their approved concept notes, brainstorm project ideas, and identify priority areas.
- Assist potential grantees in developing and defining clear and concise project goals, objectives, activities, outcomes, and indicators; and clearly identify what need or problem the project intends to address or the opportunities the project wants to address.
- Provide guidance ensuring that the proposed budget is detailed and realistic.
- Provide guidance and advice ensuring that project proposals are specific, measurable, achievable, relevant, and time-bound (SMART) with realistic timeframes.
- Consult with potential grantees on an as needed or predetermined basis to ensure continuous communication and collaboration during the project proposal

¹ Shortlisted applicants with approved concept notes will have the opportunity to request a Project Preparation Grant (PPG) to prepare their full proposals. PPG funds may provide for the designated project development leads that will also support the full proposal development (collaboration with or independent of the ACE PDSC).

development stages.

- Guide consideration of gender, environmental, and social issues in the project design.
- Make certain that the project proposals include detailed information on project management and implementation, identify potential risks and mitigation measures, monitoring and evaluation plans, and the need for financial audits.
- Advise grantees on project sustainability and financial feasibility beyond the grant funding period and clearly define how project activities will be sustained after project completion.
- Any other duties that may be assigned from time to time for the effective and efficient delivery of the consultancy.

Note: The consultant will conduct the above duties on an as-needed basis. The CBF will guide the consultant on which potential grantee requires technical assistance in preparing their full project proposal. The communication needs between the consultant and potential grantees will be established during the inception or onboarding stages.

***Deliverable 2:** Consultation with potential grantees and a report outlining the results of consultations; **Deliverable 3:** Monthly reports ; **Deliverable 4:** Final project report*

VI. CONFLICT OF INTEREST

For the purpose of this ToR, a “conflict of Interest” refers to any circumstance where the applicant’s personal interest, or that of their immediate family, business partners, or associates, conflicts with the interest of this consultancy. To ensure transparency and integrity under this consultancy, applicants must not be affiliated in any way or form with potential grantees or be contracted under the PPG agreement between the CBF and potential grantees.

VII. SCHEDULE AND DURATION OF ASSIGNMENT

The Assignment is expected to commence on **October 01, 2024**, and last through February 28, 2025. 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 (days)
Task 1: Familiarization desk study and inception meeting	5
Task 2: Technical assistance to potential grantees to prepare full project proposals	75

Total input	80
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VIII. QUALIFICATIONS AND EXPERIENCE

The consultant shall have the following qualifications and experience:

- A post-graduate degree in project planning or development, project management, environmental management, or equivalent qualification.
- A minimum of ten (10) years of demonstrated professional experience in project development or design, circular economy, solid waste management, sustainability, and environmental and social management systems. Experience with KfW and CBF grant project development is an asset.
- Caribbean work experience with project and proposal development is required.
- In-depth knowledge of circular economy and environmental management topics, including pollution management, waste management, and/or environmental management projects, is an advantage.
- Strong interpersonal, communication, task management, and analytical skills, demonstrated ability to translate policy requirements into actionable and practical recommendations.
- Attention to detail and respect for deadlines.
- Fluency in English (both oral and written).
- Spanish or French would be considered an asset.
- Ability to interact successfully with diverse stakeholder groups, non-governmental organizations, public entities, and the private sector.
- Be a well-organized and detail-oriented individual.
- Experience within a remote working team environment.
- Must be an individual currently located in the Caribbean region.

IX. 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 X 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 the 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 20 % 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.

X. 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 III), the specific tasks (see Section IV), 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: procurement@caribbeanbiodiversityfund.org with the Subject Line: "CBF-ACE-PDSC Technical Proposal – Consultancy: Sustainability of Circular Economy Projects".

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

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

The technical proposal should not exceed 10 pages, excluding the curriculum vitae (CV) of the applicant. The CV should not exceed 3 pages and shall be included as an annex to the proposal. The technical proposal should be clear and concise on the responsibilities of the consultant and should clearly outline the main tasks of the consultant. The work plan is expected to include the methodology for implementing this consultancy, a timeline for deliverables and relevant activities, inputs, and other relevant information as outlined in this TOR to deliver this consultancy.

The Financial Proposals shall be submitted via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with the Subject Line: "CBF-ACE-PDSC Financial Proposal – Consultancy: Sustainability of Circular Economy Projects".

A financial proposal outlining the breakdown budget should be as detailed as possible. The budget needs to be aligned with the consultancy's objectives and activities. The financial proposal should not exceed 4 pages and should include payment milestones.

XI. Application Deadline:

Applications shall be submitted by August 30, 2024, via e-mail. Late submissions will be automatically eliminated. The language of the Proposal and all communication with CBF shall be English. The currency of the Proposal shall be USD.

Annex A
Technical Evaluation Criteria

Evaluation criteria and sub-criteria of the tender		Maximum points
A	CONCEPT AND METHODOLOGY	55
1	Clarity and completeness of the tender	5
1.1	Organization: clarity and form	3
1.2	Integrity (checklist) (compliance with requirements)	2
2	Critical analysis of the project objectives and the TOR	15
3	Proposed concepts and methods	35
3.1	Concept and approach to sustainable project proposal development	20
3.2	Concept and approach to the ability to interact with stakeholders and potential grantees	10
3.3	Proposed agenda/work plan for the consultancy	5
B	QUALIFICATIONS AND EXPERIENCE OF THE PROPOSED STAFF	45
4	Experience	24
4.1	Caribbean work experience with project and proposal development	7
4.2	Experience in circular economy, solid waste management, sustainability	10
4.3	Experience with international/regional environmental project development (including KfW and CBF grant project development)	5
4.4	Remote working	2
5	Education	6
5.1	Relevant post-graduate degree/qualification	6
6	Other Skills	10
6.1	Demonstrated ability to interact successfully with diverse stakeholder groups, non-governmental organizations, public entities, and the private sector.	4

Evaluation criteria and sub-criteria of the tender		Maximum points
6.2	English knowledge	2
6.3	Spanish or French	1
6.4	Interpersonal and communication skills	3
7	Work sample	5
	Total	100