

**Tender Document
for
National Conservation Trust Fund (NCTF) Capacity Development
Consultancy**



TERMS OF REFERENCE

National Conservation Trust Fund (NCTF) Capacity Development Consultancy

The Caribbean Biodiversity Fund (CBF) is inviting qualified individuals to submit their technical and financial proposals for the “National Conservation Trust Fund (NCTF) Capacity Development Consultancy” bidding process. The objective of the Consultancy is the production of training and mentorship learning modules for the National Conservation Trust Funds (NCTFs) of the CBF Caribbean Sustainable Finance Architecture (CSFA), in support of the objectives of the CBF’s *Caribbean Organizations for a Resilient Environment (CORE)* Project.

1. 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, 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 \$100 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 Advancing Circular Economy (ACE) with a US \$25 million sinking fund.

Under the Conservation Finance Program, and through its Endowment, the CBF provides financial resources through eligible NCTFs that have signed Partnership Agreements with the CBF, forming the CBF Caribbean Sustainable Finance Architecture (CSFA). The Partner NCTFs then lead the grant-making at the national level with resources from the CBF and other donors.

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 CSFA. Areas of focus for institutional strengthening are governance, operations, administration, reporting, monitoring, evaluation & learning, environmental, social and gender safeguards, asset management, support for finance mechanisms development, and resource mobilization.

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

Caribbean Organizations for a Resilient Environment (CORE) Project:

Under the Conservation Finance Program, the 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, with execution support from Cuso International. It is financed by the Global Affairs Canada (GAC), with co-financing from the CBF.

The final beneficiaries of the CORE project are 8 National Conservation Trust Funds in the CORE target countries and will involve the participation of Environmental and Women's Organisations working in gender mainstreaming, Communities, and other actors in the region working in biodiversity conservation and ecosystem-based adaptation.

The CORE Project consists of the following key outcomes:

Intermediate outcome 1: Improved performance of National Conservation Trust Funds (NCTFs) and environmental and women's organizations 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 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 environmental and women's organizations receiving NCTFs funding to design and implement IGR NbCS initiatives to protect biodiversity conservation and climate change resilience

Intermediate outcome 2: Enhanced viability of regional environmental and women's organizations and conservation trust funds to expand the CSFA in support of inclusive and gender-responsive climate resilience in communities and conservation areas.

Immediate outcome:

- c. Improved knowledge and skills of CBF, NCTFs and regional environmental and women's organizations to design sustainable, IGR financial mechanisms (FMs) that increase access of women to biodiversity and climate funds.

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.

Under Intermediate Outcome 1, CORE is investing in ensuring that NCTFs develop and adopt the necessary institutional policies, operational procedures, and tools to ensure the uptake of IGR in their programming. Therefore, CORE is focusing on building institutional capacity among NCTFs in finance, governance, and operations, as well as gender and inclusion. This reflects the findings of Conservation Practice Standards assessments, Governance assessments, and Gender Gap assessments.

Increasing the capacity, knowledge, and skills of NCTFs will enable them to better design and implement gender-sensitive, inclusive programs and projects that advance biodiversity, conservation, and climate change resilience, with multiple economic and ecological benefits to the region.

More information about the CORE Project can be found at <https://caribbeanbiodiversityfund.org/project/cbf-core-project/>

2. OBJECTIVE OF THE CONSULTANCY

The objective of this Consultancy is the enhancement, design, and creation of existing and new learning modules for NCTFs in identified thematic areas. Using the results of the assessments of the Practice Standards for Conservation Trust Funds, Governance, and Gender, the Consultant will conceptualize and design learning modules targeting NCTFs.

The development of the products should take into account the following key considerations in support of the CORE Project Plan Output 1111- *IGR technical assistance provided to NCTFs to improve governance, resource mobilization and financial management, including gender budgeting*.

- consider the listed target areas for Technical Assistance in the CORE Project Implementation Plan;
- consider the prioritized recommendations from the Practice Standards Organizational Strengthening Plans and Governance Action Plan;
- consider the complementarity of resources being generated by Cuso International from the training activities of the project;
- consolidate, as much as is possible, the materials and resources from CBF's repository and those being generated from the training being provided by Cuso International;
- identify new topics from the Board Governance and Practice Standards consultancies;
- include an on-boarding module for new NCTF staff being introduced into the CSFA;
- meet the following characteristics:
 - acknowledgement and branding as per CBF and GAC visual identity guidelines;
 - language requirements for accessibility;
 - cultural sensitivity relative to the target audience;
 - shareability and adaptability;
 - integration with existing CBF ICT systems.

3. AVAILABLE DOCUMENTS

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

- Practice Standards Assessment Reports and Organizational Strengthening Plans for each NCTF, developed and finalized in 2024;

- Governance Assessment Reports and Action Plan, prepared in 2024;
- CORE Project Implementation Plan;
- Approved Logical Framework and Indicator Targets for the CORE project;
- NCTF organisational documents required to conduct the assessment;
- Toolkits, workshop documents, presentations, and other training materials in CBF's repository;
- Any other CBF documentation as needed.

4. SCOPE OF WORK

This consultancy will assess the adequacy of the existing learning resources and materials and identify and create new materials, tools, modules etc., for NCTFs capacity building and training. The exercise is envisaged as a desk study from the consultant's home office with virtual meetings with the CORE Project Management Team and other relevant CBF staff, and possibly Cuso International CORE Staff. 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 (CSFA);
- Become familiar with the Conservation Finance Program, where synergies align with the CORE Project.
- Become familiar with the CORE Project's Theory of Change and Performance Monitoring Framework, and particularly with the Gender Smart Facility and Monitoring, Evaluation and Learning capacity building components of the project;
- Become familiar with Cuso International's role of supporting Technical Assistance in the CORE project;
- Finalize the proposed approach and work plan for the assignment.

Deliverables Task 1:

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

Task 2: Conduct an assessment of existing learning modules and other resources for NCTF capacity building

- Conduct virtual meetings with the CBF Secretariat, and NCTFs as needed to deliver the assignment;
- Identify gaps and opportunities for enhancement of these resources;
- Identify new institutional capacity development resources that can be produced to address the gaps which are indicated in the CBF consultancy reports;
- Identify the best learning platform to serve as the repository for these resources;
- Identify any additional costs associated with production of these resources;

Deliverables Task 2:

- Action Plan with list and detailed description (such as structure and format) of proposed learning modules and materials, with associated costs.

Task 3: Delivery of Learning Modules for NCTFs

- Conceptualize, design, and produce at least 6 enhanced and new resources.

Deliverables Task 3:

- Module for Governance from the workshop materials for NCTF Boards;
- Module for Environmental & Social Management Systems (ESMS) from the CRAB project resources;
- Module for Financial Management;
- Module for MEAL Systems from the Cuso training materials;
- Module for Proposal Development from the Cuso training materials;
- Module for CBF CSFA onboarding for NCTFs from the CF Program materials.

5. SCHEDULE AND DURATION FOR THE ASSIGNMENT

The assignment is expected to commence in September 2025 and be completed by November 2025. The Consultant must provide an analysis of the level of effort and time requirements in the proposal.

6. REQUIRED EXPERTISE AND SKILLS FOR THE ASSIGNMENT

The consultant shall meet the following criteria:

- A graduate degree in Instructional Design, Educational Technology, Computer Science, Information Technology, or other related technical fields.
- Experience in development of adult learning modules.
- A minimum of 2 years of demonstrated working experience in designing and developing learning products.
- Experience with similar assignments for similar target users will be considered an asset.
- Experience within a remote work environment.
- Exemplary oral and written skills in English.
- Excellent interpersonal and communication skills (oral and written).

7. SUBMISSION OF PROPOSALS

This call is open to individuals only. Applicants must submit technical and financial proposals via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line: "Proposal - National Conservation Trust Fund (NCTF) Capacity Building Consultancy" addressing the scope and requirements indicated in this ToR.

The following documents must be submitted as part of the proposal:

1. Proposed methodology and work plan including delivery timelines;
2. Proposed financial proposal outlining the costs for delivery of the assignment.
3. Curriculum vitae;
4. Cover letter describing;
 - a. Key work, including how experience relates to the consultancy objectives and expected tasks;
 - b. Names and contact details of three professional referees.
5. At least 2 samples of similar work done on previous assignments.

8. SELECTION PROCESS:

- a. A compliance check for documents listed above will be conducted;
- b. All complete proposals will be reviewed by a Selection Committee against the evaluation matrix found below (Annex A).
- c. 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.

Tender Deadlines:

Proposals shall be submitted by **15th August 2025 at 11:59 PM US EST**. Late submissions will be automatically eliminated. The language of the Proposal and of all communication with CBF must be English. The currency of the Proposal must be USD.

Questions may be submitted by **6th August 2025** via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line: "National Conservation Trust Fund (NCTF) Capacity Building Consultancy".

If necessary, the CBF will be involved and answer at the latest **11th August 2025**.

Annex A

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 for assessing existing learning modules and other resources for NCTF capacity building	15
3.2	Concept and approach to conceptualize, design, and produce the deliverables	11
3.3	Proposed agenda/work plan for overall delivery of the full assignment	4
B	QUALIFICATIONS AND EXPERIENCE OF THE CONSULTANT	52
4	Experience	30
4.1	A minimum of 2 years of demonstrated working experience in designing and developing learning products	10
4.2	Experience with similar assignments for similar target users	10
4.3	Samples of previous similar work	10
5	Education	5
5.1	Relevant post-graduate degree	5
6	Other Skills	7
6.1	English knowledge	3
6.1	Interpersonal and communication skills	4
7	Budget (adequacy, breakdown, efficiency)	10
	Total	100