

**Tender Document
for
Consultancy to Develop a Resource Mobilization Strategy and
Plan for the Gender Smart Facility of the Caribbean Biodiversity
Fund**



TERMS OF REFERENCE

CBF-GSF Resource Mobilization Strategy and Plan Development

The Caribbean Biodiversity Fund (CBF) is inviting qualified individuals to submit their technical and financial proposals for the “CBF-GSF Resource Mobilization Strategy and Plan Development” consultancy bidding process. The objective of the Consultancy is to develop a resource mobilization strategy and plan that will seek to expand the investment of the Gender Smart Facility being implemented by the CBF through its *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 National Conservation Trust Funds (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.

More information about the CBF can be found at <http://www.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 and 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:



1. **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 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 environmental and women's organizations 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 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:

- a. 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.

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.

Under Intermediate Outcome 2, a grant making mechanism - a Nature-based Climate Solutions (NbCS) Gender Smart Facility (GSF) - has been designed with the goal of promoting increased women's access to climate funds and net positive biodiversity outcomes in Caribbean communities. The GSF will disburse grant funding for local Ecosystem-based Adaptation and Circular Economy projects in the target countries via the 8 participating NCTFs. Through the GSF, Environmental and Women's Organizations will apply for and receive small and medium grants to implement nature-based climate solutions with a gender lens. The GSF will serve as a

regional example on how NbCS can become more effective in delivering results by incorporating integrated gender-responsive measures. The GSF is being initially capitalized through a contribution of CAD \$4M from the CORE Project, matched by a CAD \$3.7M contribution from the CBF for a total funding pool of CAD \$7.7M.

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 the Consultancy is to develop a resource mobilization strategy and plan for the CBF with a focus on securing long-term project financing to continue implementation or scale up successful approaches achieved through CORE's GSF.

The development of the resource mobilization strategy and plan should take into account the following key considerations in support of the CORE Project Plan Output 1212 - *Mobilize resources to strengthen the GSF, including private sector contributions, and increase access of women to biodiversity and climate funds*:

- Through CORE, CBF has a focus on ensuring new and sustainable finance mechanisms that will help address the needs of women and other vulnerable groups in the long term. ● Beyond the initial capitalisation of the GSF by GAC, CBF is seeking to mobilize resources from regional and international private sector or climate impact funds to sustain gender responsive climate financing targeting women.
- The CBF aims to adopt gender-responsive financing as a long-term institutional practice and will champion the move from gender disaggregation to gender responsiveness in the Caribbean climate response.
- After initiating GSF projects, the focus activities of CORE will be implementation of the resource mobilization plan, working through CBF to design funding proposals aimed at securing further investment into the Facility to support inclusive and gender responsive climate resilience building in the Caribbean.
- To ensure recurrent investment for activities that enhance biodiversity and climate change resilience and facilitate access for women to biodiversity and climate finance, the resource mobilization plan should leverage the initial GSF funds and stimulate the creation of a blended finance ecosystem that will allow CBF to re-orient the flow of international and local resources towards more IGR NbCS sustainable actions, the creation of national IGR financial mechanisms and support local women's organizations that support women entrepreneurs, especially green businesses at a second GSF stage.
- The consultancy should consider and complement other CBF efforts at Sustainable Finance Mechanisms, including but not limited to:
 - the Blue Economy Hub, being designed through the CBF BluEFIN Project that envisions incorporating women-led climate initiatives, particularly supporting small and medium enterprises within the blue economy.
 - the Marine Protected Area (MPA) financing facility being considered under the EMPAC Project that proposes to mobilize resources for financing marine conservation initiatives.
 - new and emerging CBF resource mobilization and management opportunities

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
- Documents related to other CBF Programs and Projects with complementary activities



- Any other relevant

CBF documentation as needed.

4. SCOPE OF WORK

The Consultancy will develop a feasible framework to guide the CBF in mobilizing resources from private sector or climate impact funds to sustain gender responsive climate financing targeting women. The assignment will deliver a practical plan, detailing optimal actions towards the objectives. The Consultancy is envisaged as a desk study from the consultant's home office with virtual meetings. The Consultant will report to the CORE Project Technical Officer.

The Consultant is expected to perform the following tasks:

Task 1: Familiarization, desk study and Inception Report

- Become familiar with the CBF, the CORE Project, and its beneficiaries.
- Review documents of complementary CBF projects.
- Review existing literature on gender responsive financing, including the Gender Action Plan of the Convention on Biological Diversity and particularly existing literature on gender equality in biodiversity conservation in the Caribbean region.
- Inception Meeting with the CBF Secretariat to discuss consultancy implementation.
- Develop a revised work plan that outlines the approach and timeline, among other elements, to conduct the assignment.

Deliverables Task 1:

- Inception Report outlining updated approach and work plan of the Consultancy.

Task 2: Research and Development of Draft RM Strategy and Plan

- Understand current status of the CBF's efforts and opportunities in mobilizing additional resources and propose relevant linkages to the GSF objectives.
- Conduct virtual meetings and interviews with relevant CBF stakeholders, including CBF team, NCTFs and GSF beneficiaries as necessary.
- Research and analyze sources of potential funding sources, in particular, private sector and Impact Funds, with particular attention to Funds with gender mainstreaming targets.
- Research opportunities for leveraging the existing GAC network.
- Rank identified options based on alignment to the CORE project outcomes, accessibility, and other relevant characteristics.

- Carry out exploratory consultation with potential funding sources as part of the research process.
- Prepare a draft strategy and plan based on the results of the research and ranking. This should include a timeframe and resources needed for implementation.
- Present to the CBF Secretariat the draft GSF RM Strategy and Plan.
- Prepare a final draft of the GSF RM Strategy and Plan.



Deliverables Task 2:

- Draft GSF RM Strategy and Plan document.
- Oral presentation of the draft GSF RM Strategy and Plan.
- Final GSF RM Strategy and Plan document.

5. SCHEDULE AND DURATION OF ASSIGNMENT

The Assignment is expected to commence in December 2025 and be completed by March 2026. The estimated effort (Time Input) by task distributed during the consultancy period, will be proposed by the Consultant in the technical proposal and finalized in the revised work plan during the inception phase.

6. REQUIRED EXPERTISE FOR THE ASSIGNMENT

The Consultant must have the following qualifications:

- A graduate or postgraduate degree in environmental economics, finance, sustainable development, or related academic field.
- A minimum of 10 years of demonstrated knowledge of fundraising, program development, sustainable development, institutional resource mobilization and strategy planning in the topics of climate change, gender mainstreaming, and biodiversity conservation.
- Previous experience delivering similar assignments would be a strong asset. ● Previous experience working with a regional Conservation Trust Fund or Environmental Organization would be a strong asset.
- Experience in environmental and conservation financing in the Caribbean Region would be an asset.
- Knowledge or experience working with gender-focused programs or projects would be an asset.
- Exemplary oral and written skills in English.
- Excellent interpersonal and communication skills (oral and written).
- Experience in delivering assignments within a remote work environment.


7. SUBMISSION OF PROPOSALS

This call is open to individuals only.

Tenderers must submit a technical and financial proposal via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line: ***“Proposal - CBF GSF Resource Mobilization Strategy and Plan Consultancy”*** addressing the overall requirements of the assignment’s objectives as outlined in this ToR, and addressing the evaluation areas contained

in the evaluation criteria (see Annex A).

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

1. Technical Proposal inclusive of:
 - a. a summary of key similar work, describing its relation and value to the consultancy objectives and expected outputs;
 - b. a description of the approach and methodology and a proposed work plan including delivery timelines;
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The image shows the logos for Canada and the Caribbean Biodiversity Fund. On the left is the Canadian flag. To its right is the text 'In partnership with Canada' with a small Canadian flag. Further right is the Caribbean Biodiversity Fund logo, which consists of a stylized green circular graphic and the text 'CARIBBEAN BIODIVERSITY FUND'.
- c. Curriculum vitae;
 - d. names and contact details of three professional referees, preferably associated with the similar assignments listed.
2. Financial proposal outlining the budget to execute the consultancy.

Selection Process:

1. A compliance check for documents listed above will be conducted. Incomplete packages will not be processed.
2. All complete proposals will be reviewed by an Evaluation Committee against the evaluation matrix found below.
3. The CBF will contact the highest ranked Tenderer 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:

Tender packages must be submitted by **30 October, 2025** at 11:59 PM US EST. Late submissions will be automatically eliminated. The language of the documents and of all communication with CBF must be English. The currency of the Financial Proposal must be USD.

Questions may be submitted by **15 October, 2025** via e-mail to the following address: procurement@caribbeanbiodiversityfund.org with Subject Line: "Questions: CBF-GSF Resource Mobilization Strategy and Plan Consultancy". If necessary, the CBF will answer at the latest **7 days before the submission deadline**.

The CBF is not liable for any expenses incurred by the Tenderer in preparation of Tender packages.

Annex A: Evaluation Criteria

Evaluation criteria and sub-criteria of the Tender	Maximum points
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A	TECHNICAL PROPOSAL		50
1	Clarity and completeness of the proposal	5	
1.1	Organization: clarity and form	3	
1.2	Integrity (compliance with required documents)	2	
2	Critical analysis of the project objectives and the TOR	15	
3	Proposed concepts and methods	30	
3.1	Concept and approach on developing the Resource Mobilization Strategy and Plan	20	
3.2	Proposed work plan for delivery of the full assignment	10	
B	QUALIFICATIONS AND EXPERIENCE OF THE CONSULTANT		30
4	Experience	25	
4.1	Demonstrated knowledge on fundraising and resource mobilization for conservation, climate, and gender work programs	10	
4.2	Understanding of fundraising and Strategy	5	
4.3	Planning Experience in delivering similar	7	
4.4	assignments	3	
	Experience working with environmental organizations in the Caribbean Region		
5	Education	5	
5.1	Relevant graduate or post-graduate degree	5	
C	FINANCIAL PROPOSAL		20
6	Adequate Costing	20	
6.1	Cost breakdown and justification	7	
6.2	Alignment with scope of work and deliverables in Technical Proposal	10	
6.3	Payment Schedule and Terms	3	
	Total		100