



Working Groups Program

Terms of Reference for a consultancy

Consultancy contract administered by:

Department:	Development and Partnerships
Unit:	BRIDGE Project

1. Purpose of the Consultancy

Forever Costa Rica (FCR) seeks a team of consultants to design a Working Groups Program and facilitate virtual sessions for staff of Conservation Trust Funds (CTFs) members of the Latin American and Caribbean Network of Environmental Funds (RedLAC) and the Consortium of African Funds for the Environment (CAFÉ) on issues related to private sector engagement with biodiversity conservation efforts. This program is part of the BRIDGE Project, an initiative financially supported by the French Facility for the Global Environment (FFEM) and the MAVA Foundation.

2. Background

CTFs are defined as “private, legally independent institutions that provide sustainable financing for biodiversity conservation” (*Practice Standards for Conservation Trust Funds*, 2020). They operate as catalyzers for long-term funding, using resources typically composed of one or more endowments and additional sinking or revolving funds as their principal source of income. By ensuring sustainable resources, CTFs have become, over the last 25 years, effective grant-makers for conservation programs and sustainable projects, providing broad sustainable financing for a far-reaching range of environmental actions such as national management of protected areas, sustainable livelihoods, blue and green economies, and other conservation and climate initiatives.

The BRIDGE initiative seeks to move the needle of CTFs in Latin America, the Caribbean, and Africa toward the 2030 action targets by engaging the private sector in conservation finance. The project also promotes CTFs' access to private resources from different economic sectors through new partnerships and innovative financial mechanisms.

The BRIDGE project has three components:

- 1. Private Sector Innovation Fund:** RedLAC and CAFÉ member CTFs receive funding to study and test the feasibility of new financial mechanisms involving the private sector.

- 2. Exchange and Capacity Building on Conservation Finance with the private sector:** to develop and strengthen CTFs' capacities to engage with the private sector through exchanges and mentorships.
- 3. Building and Managing Knowledge in the Long-term:** to produce a learning system that systematizes best practices and network members' experiences.

Component 2 aims to strengthen CTFs' capacities by providing opportunities to exchange and learn from the experiences of other CTFs, tackling specific needs or demands, shortening the learning curve, and fostering operational excellence. One of the tools to achieve this goal is the **BRIDGE Working Groups Program**.

3. BRIDGE Working Groups Program

Background

RedLAC and CAFÉ have existing working groups with different objectives. These groups include Financial Sustainability, Fundraising, Communications, Private Sector Relations, and Monitoring and Evaluation. Some groups are active through virtual meetings and exchange of documents, yet others are no longer active. The BRIDGE Project aims to activate or reactivate working groups in both networks, focusing on private sector engagement.

What is a BRIDGE Working Group?

A group composed of professionals from member CTFs working together to build collective knowledge on topics related to private sector engagement.

What are the Working Groups for?

BRIDGE Project's working groups seek to enhance communication and collaboration among CTFs. These communities of practice allow the networks to create opportunities to share knowledge, experiences, and resources, and generate expertise on working in conservation initiatives with the private sector.

How do Working Groups function?

These learning communities are spaces where an external facilitator leads the sessions and brings relevant exercises and activities to focus on the group's theme. Topic experts can be invited, and CTFs can present their experiences.

Beginning in August 2024, the BRIDGE Project will support the following working groups focused on working with the private sector to benefit RedLAC and CAFÉ CTFs:

For RedLAC members¹:

- 1. Fundraising and financial sustainability:** participants will learn options to diversify, multiply, and increase their CTFs' sources of financial support, with an emphasis on private alternatives.
- 2. Monitoring and evaluation/impact assessment:** CTFs will share practical ideas and lessons to build their institutional capacities to manage risk and effectively measure conservation project's impact. Topics include environmental and social safeguards, definition of indicators and how to measure them, monitoring and reporting systems, and institutional risk management tools.
- 3. Communication with the private sector:** participant CTFs will reinforce their brand management skills, position their strengths, and improve their reporting to external audiences. Overall, this working group seeks alternatives where CTFs and the private sector can understand each other and get to speak the same language.

For CAFÉ members:

- 1. Fundraising and financial sustainability:** participants will learn options to diversify, multiply, and increase their CTFs' sources of financial support, with an emphasis on private alternatives.
- 2. Funding mechanisms around nature-based solutions:** topics to be addressed in this group include fundraising with the private sector and exploring financial mechanisms such as blended finance, blue bonds, carbon credits, carbon offsets, projects around nature-based solutions, and ecosystem-based adaptation.
- 3. Monitoring and evaluation/impact assessment:** CTFs will share practical ideas on how to build their institutional capacities to manage risk and effectively measure conservation project's impact. Topics include environmental and social safeguards, definition of indicators and how to measure them, monitoring and reporting systems, and institutional risk management tools.

For RedLAC & CAFÉ members together:

- 1. Knowledge exchange & CTF operations:** this cross-network working group will address topics such as investment strategies, internal procedures, and programmatic diversification, including new topics and private partners. Participant CTFs will purposefully join the working group and learn additional tools to be long-lasting organizations.

¹ These RedLAC working groups are expected to collaborate with the existing RedLAC working group on marine-coastal management.

The working groups are exclusive for CTF members of CAFÉ and RedLAC and will be carried out considering the following elements:

- **When:** Each working group is projected to start in August 2024.
- **Language:** CAFÉ working groups will be carried out in English with French translation, and RedLAC working groups will be in Spanish with English translation.
- **Modality:** Working groups will be carried out through virtual collaborative platforms (ZOOM, TEAMS, etc.).
- **Participation:** Each working group will prioritize members from their network to join, but CAFÉ CTFs may participate in a RedLAC working group and vice versa (considering the language and the scheduling of the sessions).
- **Voluntary registration:** Interested CTF staff will join groups voluntarily.
- **Group size:** It is estimated that each group will have 20-25 participants.
- **Frequency:** Facilitators and participants will jointly define dates, hours, and frequency of virtual sessions, but each session should last no more than 2 hours.
- **Chair:** Each group will have a Chair and Vice Chair (from the group participants) to work with the facilitator. The Chair and Vice Chair will bring stability and continuity to each working group over time and after BRIDGE resources end. They will be responsible for setting meeting times and agendas and facilitating the sessions once the facilitator's term ends.

4. Scope of services

The consultant team is required to:

1. Design and develop the virtual pedagogical content for the Working Groups Program²

- Develop the program's targets, goals, outcomes, and timeline.
- Define each group's work plan and syllabus.
- Determine the methodology for the virtual sessions of each working group, including different interactive dynamics and engaging approaches (a combination of knowledge-sharing methods: case studies, lecture sessions, individual participant presentations, problem-solving, subgroup assignments, etc.).

² The design of a program of at least 2 years is expected. However, in practical terms, the execution of this consultancy should not respond to said timeframe but instead to the technical and financial approach to carry out the 4 tasks required (see tasks 2, 3, and 4 below).

- Propose the amount and frequency of each working group's sessions (ideally, 1 session every 4 weeks) for the entire program.
- Consider the existence of diverse backgrounds, skills, expertise, knowledge, time zones, and languages among CTF staff.
- Be aware of different interpersonal dynamics, cultures, seniority levels, and learning abilities among participants.
- Design a program that allows working groups to continue being active beyond the facilitation stage under this consultancy (see next point). Recommend ways/mechanisms for the permanence of each working group after the facilitators' participation.

2. Plan and facilitate the working groups' virtual sessions for CTF staff

- Carry out and facilitate at least 7 virtual sessions for each working group.
- Lead and/or recruit each group's facilitators.
- Share each group's work plan and syllabus with participants.
- Determine the best virtual platform (ZOOM, TEAMS, others).³
- Carry out the virtual facilitation of each working group according to the technical input from previous task.
- Incorporate practical examples and tools to keep group members engaged and motivated.
- Arrange each group's sessions to last a maximum of 2 hours.
- Plan to deliver active and productive experiences for all participants.
- Take notes and record each session and share these with participants.

3. Design a set of indicators to monitor and assess the Working Groups' Program expected results

- Define the indicators according to the program's targets, goals, and outcomes.
- Prepare a dashboard or matrix to follow up on the evaluation of each indicator, including a list of questions to collect data through questionnaires or interviews and all relevant information for indicator measurement.
- Gather information from participants to measure the baseline of their knowledge and experience in the subject matter of their working group.
- Follow up and assess the Working Group Program 6 months after each facilitator completes their role.
- Establish the monitoring frequency of the indicators after BRIDGE resources end.

³ CAFÉ working groups will be carried out in English with French translation, and RedLAC working groups will be done in Spanish with English translation.

4. Systematize the experience

- Prepare a handbook about the whole learning experience and one for each Working Group.

5. Deliverables and planning

This consultancy is expected to be carried out between August 2024 and October 2025.

Deliverables	Timeline
Detailed work plan	August 15, 2024
Working groups begin implementation	September 1, 2024
Set of indicators and dashboard	October 15, 2024
Initial assessment for baseline information on participants' knowledge and experience in the subject matter of their working group	December 01, 2024
Mid-term progress report of consultancy	July 15, 2024
Post-facilitation assessment on participants' enhanced knowledge and experience in the subject matter of their working group	October 15, 2025
Systematization (8 handbooks)	October 15, 2025
Final report of consultancy	October 15, 2025

6. Payment

The budget available for this consultancy service cannot exceed US\$125,000, with all taxes included.

7. Project Oversight

The consultant team will be under the direct supervision of the BRIDGE Project Coordinator through Forever Costa Rica (FCR).

8. Skills & Qualifications

The team of consultants must demonstrate collective knowledge and experience in the following:

- At least 7 years of experience in organizational strengthening for non-profits, preferably in the environmental sector, in the following topics: fundraising and financial sustainability, monitoring and evaluation, impact assessment, risk management, CTFs operations, and CTFs communication.
- Proved knowledge and a solid understanding of CTFs governance and management.



- Demonstrated expertise in facilitation/pedagogy in a variety of virtual platforms.
- Technical experience in Monitoring & Evaluation.
- Strong verbal and writing communication skills, including liaising with technical staff and presenting information clearly and concisely.
- Fluency in English, and additionally in French or Spanish is essential for facilitators.
- Experience in Latin America, Africa, and the Caribbean is a plus.

9. Application process

The documentation must be submitted to Leonardo García (lgarcia@costaricaporsiempre.org) no later than **May 24th, 2024, at 11:59 pm UTC**. Please include “BRIDGE Project: Working Groups” as the subject line.

The proposal shall include the following:

- **Team members:** A description of the team members involved in the consultancy. Include their CVs with at least 3 professional references and their contact information.
- **Methodology:** A detailed description of the proposed methodology to design and carry out the Working Groups Program.
- **Activities and Timeline:** A description of the consultancy's general approach to virtual facilitation, including activities, estimated timelines, and overall project completion.
- **Financial proposal:** A detailed budget that includes expected expenses required for a successful execution of the program.

The documentation language and all communication with FCR shall be in English. The currency of the proposal shall be United States dollars (USD).

Questions may be submitted before **April 30th, 2024**, to lgarcia@costaricaporsiempre.org with the subject line: “Questions BRIDGE Project: Working Groups”. FCR will answer on May 10th, 2024, at the latest. The selected consultant team will be contacted by **June 30th, 2024**.

10. Tenders General Scoring System

Technical Proposal: evaluated out of 100 points, based on the following criteria:

1. Concept and Methodology	60 points
Proposed concepts and methods	(40 points maximum)
Organization and planning	(10 points maximum)
Following guidelines and instructions	(10 points maximum)
2. Qualifications and experience	40 points
Current experience in fundraising and financial sustainability, monitoring and evaluation, impact assessment, risk management, CTFs operations, CTF communication	(20 points maximum)
Proven knowledge and understanding of CTFs	(5 points maximum)
Professional experience in pedagogy/virtual education and group facilitation	(5 points maximum)
Fluency in English and additionally in French or Spanish	(5 points maximum)
Regional experience in Latin America, Africa, and the Caribbean	(5 points maximum)

Candidates with technical proposals scoring under 80 points will be eliminated automatically. Among the successful candidates, the best score is equivalent to 100 points. The scores of the other candidates are then adjusted based on the following equation:

$$TP = (\text{technical score of the tenderer under consideration} / \text{best technical score}) \times 100$$

Financial Proposal: tenderers with a technical score of at least 80 points will be considered.

The financial proposals are first compared with the maximum budget available for the service. Tenders exceeding the maximum budget allocated for the contract will be eliminated.

For the remaining proposals, scores are assigned as follows: the lowest proposal price is given 100 points, and the other proposals are awarded points according to the following equation:

$$FP = (\text{lowest proposal price} / \text{price of the relevant proposal}) \times 100$$

After that, the best value offer is selected by weighing the technical score against the financial score on an 85/15 basis, according to the formula below:

$$N = (0.85 \times TP) + (0.15 \times FP)$$

N: Final weighted score

TP: Technical Score of the candidate concerned

FP: Price offered by the candidate concerned

The winning bid will be the one receiving the highest value for N.