

## **TERMS OF REFERENCE**

### **Biodiversity Friendly Enterprises (BDFE) Consultant Phase II Davao Gulf**

#### **A. Project Title**

Strengthening Marine Protected Areas to Conserve Marine Key Biodiversity Areas

#### **B. Project Description**

The project “Strengthening the Marine Protected Areas to Conserve Marine Key Biodiversity Areas in the Philippines” or SMARTSeas PH, being supported by UNDP and GEF, is currently implemented through the Biodiversity Management Bureau of Department of Environment and Natural Resources. The Project covers five (5) demonstration sites: Southern Palawan [SP]; Tanon Strait Protected Seascape [TSPS]; Verde Island Passage [VIP]; Lanuza Bay [LB] and Davao Gulf [DG]. Project interventions are implemented in collaboration with Local Responsible Partners [LRPs] on site, namely: National Fisheries Research and Development Institute [NFRDI] for SP; Rare Philippines for TSPS; Conservation International Philippines Foundation, Inc. for VIP; Haribon Foundation for LB and Kabang Kalikasan sa Pilipinas Foundation, Inc for DG. PMU is also collaborating with Provincial Agriculture Office for Oriental Mindoro [PAgO] for ecotourism potentials in their better managed MPAs.

The project seeks to accelerate the establishment of marine protected areas (MPAs) and marine protected area networks (MPANs) to include more key marine biodiversity areas and improve MPA/MPAN management effectiveness to reduce the rapid degradation of marine and coastal habitats and alarming biodiversity loss.

Outcome 2 of the project (Improved Financial Sustainability of MPAs and MPANs), interventions at the national, MPAN, and individual MPA level aims to promote cost efficiencies and cost effectiveness in MPA management, improve and diversify funding sources, enhance capacities for financial and business planning including sound decision making pertaining to resource allocation, and transparent processes for fund management. A functioning system for tracking expenditures and monitoring fund inflows should be in place, firmly supported by an enabling legal and policy framework. The project has formulated four major outputs to achieve this outcome, namely:

Output 2.1: Benchmark management costs established for MPAs of varying size and potential cost savings or cost efficiencies on average per site identified through consolidation of management functions in MPANs.

Output 2.2: At least two MPANS (Verde Island Passage and Davao Gulf) implementing financing and business plan targeting increases in revenue generation from the tourism and fisheries sectors.

*Output 2.3 At least five (5) of locally managed MPA in each of five (5) sites have revenue generation schemes in operation, including market-based visitor and service fees for tourism operators, pilot ecological service payments from the fisheries sector and local taxes for conservation and management of key tourism draws.*

Output 2.4 MPA financing plans developed and piloted in at least 30% of MPAs in each of five sites, incorporating governance mechanisms to ensure participatory management of revenues and resources involving local communities, local government and national government agencies as appropriate.

This contract will cover project interventions to address the capacity gaps in Davao Gulf, with business

incubation activities aligned with the results of the rapid BDFE assessment conducted in Phase 1.

**C. Scope of Work**

Under the direct supervision of the SMARTSeas PH Project Manager and Outcome 2 Officer, the hired Consultant shall deliver the following:

Community preparation to include the following activities: validation of BDFE viability assessment results; action planning; BDFE sensitizations at PO level; BDFE planning workshops; PO validation of BDFE plans; technical viability assessment of BDFE plans; engagement of key stakeholders.

Business incubation to include the following activities: technical BDFE specific training; product supply organizing; capital-build up and provision of incentives to complement PO/BDFE resources; market linkage/facilitating negotiations with buyers; product supply organizing training and initial trading; simple record keeping and reporting; facilitating links with financial institutions for low interest loans and savings program; financial literacy at PO level.

Sustaining Activities to include the following activities: exploring technical and economic viability identified BDFEs; facilitating access to finance institutions for low interest loans and savings program; exploring potentials for scaling up and building resiliency.

**D. Expected Outputs and Deliverables**

<b>Deliverables/ Outputs</b>	<b>Estimated Duration to Complete</b>	<b>Target Due Dates</b>	<b>Review and Approvals Required</b>
Work plan	3 days/site	1 week from contract award	Outcome 2 Officer Project Manager
V/M/G Organizational structure (BDFE leadership and governance structure) and BDFE business plan	35 days/site	8 weeks after contract award	Outcome 2 Officer Project Manager
Implementation Plan and report (1 <sup>st</sup> cycle)	50 days/site	17 weeks after contract signing	Outcome 2 Officer Project Manager
Business sustainability plan	15 days/site	22 weeks after contract signing	Outcome 2 Officer Project Manager
Final report	5 days/site	22 weeks after contract signing	Outcome 2 Officer Project Manager

**E. Institutional Arrangement**

The SMARTSeas Project Manager with PMU focal for Outcome 2 shall directly supervise the Consultant, in coordination with the local responsible partner (LRP).

At different points during the contract, the Consultant is expected to liaise/interact/collaborate/meet with the SMARTSeas PH project team, DENR BMB and LRPs. As needed, the SMARTSeas PH project staff shall provide logistical assistance to the Consultant in order for her/him to accomplish enumerated outputs.

**F. Duration of the Work<sup>1</sup>**

The expected duration of work is estimated to be **150** working days spread over (6) months. The target date for the start of work is on 1 April 2019 and the completion date is 30 September 2019.

**G. Duty Station**

The Consultant is not expected to report on a daily basis to the Project Management Office based in BMB, Quezon City but shall be available on an on-call basis.

**H. Qualifications of the Successful Individual Contractor**

<b>Qualification</b>	<b>Points Obtainable (100 points)</b>
<p><u>Over-all requirement</u></p> <p>With minimum 5 years experience in enterprise development, community organizing, provision of business development service and experience working with fisherfolk communities and grassroots level organizations.</p> <p>Capacity and willingness to deliver within the given time.</p>	20
<p><u>Educational requirement and experience</u></p> <ul style="list-style-type: none"><li>• Degree in Economics, Business Management, social development and other allied courses.<ul style="list-style-type: none"><li>▪ With experience in development of community project management for fisherfolk association;</li></ul></li><li>• Familiar with biodiversity friendly approach to enterprise development;</li><li>• With extensive experience in value chain approach relevant to fishery development;</li><li>• With previous experience in facilitating market linkages</li><li>• With previous contract with development organizations</li><li>• With previous working experience in BDFE or MSMEs establishment</li><li>• Experience in providing consultancy services specifically to community-based organizations (CBOs), and in implementing community-based and participatory approaches</li></ul>	70

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<sup>1</sup> *The IC modality is expected to be used only for short-term consultancy engagements. If the duration of the IC for the same TOR exceeds twelve (12) months, the duration must be justified and be subjected to the approval of the Director of the Regional Bureau, or a different contract modality must be considered. This policy applies regardless of the delegated procurement authority of the Head of the Business Unit.*

Qualification	Points Obtainable (100 points)
<ul style="list-style-type: none"> <li>With a pool of experts covering fields of: food technology, market linkage, organization and financial system development, ecotourism, policy mapping and analysis, gender and IP rights.</li> </ul>	
<u>Language</u> <ul style="list-style-type: none"> <li>Good command of oral and written English</li> <li>Familiarity with the local language</li> </ul>	10
<b>TOTAL</b>	<b>100</b>

#### I. Scope of Price Proposal and Schedule of Payments

Interested parties are required to submit an all-inclusive lump sum amount indicating professional fees and local transportation required to effectively perform the duties and responsibilities of the Consultant. Actual costs for the actual event, such as travel allowance and hotel accommodation expenses, shall be shouldered by the Project.

The Consultant will receive the total amount indicated in the proposal in tranches and upon satisfactory completion of the agreed outputs and deliverables based on the following table:

Percentage	Description	Deadline
20%	Submission and acceptance of workplan	2 weeks after contract award
30%	Submission and acceptance of BDFE leadership and governance structure and BDFE business plan	8 weeks after contract award
30%	Submission and acceptance of Implementation Plan and report (1 <sup>st</sup> cycle)	17 weeks after contract signing
20%	Submission and acceptance of completion report with Business sustainability plan	22 weeks after contract signing

#### J. Recommended Presentation of Offer

For purposes of generating offers whose contents are uniformly presented and to facilitate their comparative analysis, it is best to recommend the preferred contents and presentation of the Offer to be submitted, as well as the format/sequencing of their presentation. The following documents may be requested:

- Duly accomplished **Letter of Confirmation of Interest and Availability** using the template provided by UNDP;
- Personal CV or P11**, indicating all past experience from similar projects, as well as the contact details (email and telephone number) of the Candidate and at least three (3) professional references;
- Brief description** of why the individual considers him/herself as the most suitable for the assignment, and a methodology, if applicable, on how they will approach and complete the assignment. A methodology is recommended for intellectual services, but may be omitted for support services [*Note: this is optional for support services*];
- Financial Proposal** that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs, as per template provided. If an Offeror is employed by an organization/company/institution,

and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under Reimbursable Loan Agreement (RLA), the Offeror must indicate at this point, and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP.

**K. Criteria for Selection of the Best Offer**

The Combined Scoring method is the criteria for selection where the qualifications and methodology will be weighted a maximum of 70%. The price offer will be weighted a maximum of 30%.