TERMS OF REFERENCE
CONSERVATION TRUST FUND SPECIALIST

Project Title: The Biodiversity Finance Initiative (BIOFIN)
Type of Position: Conservation trust fund specialist
Type of Contract: Individual Contract (International)
Duty Location: home based
Language Required: English
Duration of contract: Up to 40 working days
Application deadline: 21 June 2020
Expected Start Date: 06 July 2020

A. Background

National governments have demonstrated clear commitment to fulfilling their mandates for biodiversity conservation and sustainable use in ways that are compatible with national development goals, and to finding a diverse range of funding sources for biodiversity management. UNDP believes a transformation is needed in the way biodiversity finance is planned and managed, unlocking resources to meet the Aichi Targets, defined in the CBD’s Strategic Plan 2011-2020, in a manner that promotes sustainable development and the eradication of poverty.

BIOFIN in Mongolia concluded these steps early 2019, resulting in the identification of a number of biodiversity finance solutions, including the strengthening of existing pasture user fees, natural resource management fees, the design of an environmental trust fund, protected area finance and financing conservation through sustainable businesses.

Policy and institutional review, Biodiversity expenditure review and Finance needs assessment findings were compiled and published as “Biodiversity finance needs, policy and trends”, and the finance plan with the feasibility studies of the chosen finance solutions were published as “Biodiversity finance plan”. Finance needs assessment was conducted within the framework of the National Biodiversity Programme (NBP) 2015-2025.

In 2018, BIOFIN started a second phase, geared towards the implementation of Biodiversity Finance Plans and finance solutions. It will run through the end of 2022 and involve at least 28 countries. In this regard, UNDP Mongolia is implementing the second phase of BIOFIN project with objective of supporting the execution of the Biodiversity Finance Plan through feasible financial solutions.

During BIOFIN I phase, the assessments on precondition and feasibility for establishing Conservation Trust Fund under existing national circumstance were conducted and inferred that an independent, self-sufficient legal and national-level Mongolia Conservation Trust Fund (MCTF) is the one of the feasible finance solutions for securing sustainable resources for biodiversity conservation management in Mongolia.

The desired MCTF is expected to support mobilizing, blending and overseeing the collection and allocation of financial resources for biodiversity conservation activities in a sustainable manner. Moreover, it is expected that fully operational MCTF ensures the enhanced cooperation of various environmental organizations and strengthened collaboration between public and private institutes and NGOs and focused biodiversity conservation in national context.
Therefore, UNDP CO is seeking for a **Conservation Trust Fund specialist** to define a specific design of MCTF in national context and recommend on follow up action for start-up und launch phases.

**B. Objectives and scope of work**

The overall objective of the consultancy is to compile a feasible design of Mongolia Conservation Trust Fund (MCTF) in national context and follow-up MCTF launch action plan. The desired MCTF design shall be specified by 3 components: conservation impact, financial sustainability and governance structure.

The appointed consultant shall undertake following tasks:

**1. MCTF conservation impact**

1.1 Identified MCTF’s role, specific focus areas, purpose (mission) and long-term vision in Mongolia’s national context, taking into consideration the weaknesses and strengths of Public Special Fund on Environment and Climate.

1.2 Projection of the MCTF conservation impact with respect to principles: *Baseline (Business as usual scenario, BAU), Additionality, Permanence, Leakage and Co-benefit.*

1.3 Developed MCTF conservation impact monitoring and evaluation system with an evaluation criteria and monitoring indicators set

1.4 Stakeholder engagement map and strategic partnership over conservation impact landscape.

**2. MCTF financial sustainability**

2.1. Design and map sustainable financial landscape over the dimension of fund generation and fund delivery, ensuring *Cost effectiveness, Cost efficiency and Value for Money* principles

2.1.1. Design a fund generation mechanism with resource mobilization strategy, addressing potential fundraising, investments from various stakeholders and revenue generation options.

   a) Elaborate a survey template for identifying potential fundraising sources (public, private and international)

   b) Assessment on diversified fundraising sources for MCTF (*inputs from local consultant is required*)

   c) Potential options of income generating activities (aside from the fundraising).

2.1.2. Design a fund delivery scheme /resource disbursement strategy and eligible criteria set for grants, projects, capacity building and knowledge pursuant to specific focus area (1.1).

2.2. Design fund structure (*endowment, revolving, sinking or combination*) with underlying on financial landscape (2.1)

2.3. Map long term stakeholder engagement over MCTF financial landscape and identify strategic partnership. (*inputs from local consultant is required*)

2.4. Conduct SWOT analysis on financial sustainability of selected MCTF mechanism and elaborate risk mitigation plan.

**3. MCTF governance structure**

3.1. Determine legal status of MCTF consistent with financial landscape (2.3) and fund structure (2.5)

3.2. Steering board membership, that ensures diverse and participatory of stakeholders to be independent and.

3.3. Design MCTF transparency and develop accountability system for the Fund management.
3.4. Develop MCTF organigram, that shows the structure of an organization and the external and internal relationships.

3.5. Validation of the MCTF design and governance structure.

3.6. Recommendation on follow-up action for MCTF launching;

C. Expected output/deliverables

<table>
<thead>
<tr>
<th>Deliverables/Outputs</th>
<th>Estimated duration to complete</th>
<th>Instalment (%)</th>
<th>Target due dates</th>
<th>Review and approvals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Corporate layout of MCTF design profile document</td>
<td>14 working days</td>
<td>20%</td>
<td>15 August 2020</td>
<td>UNDP CO PIU</td>
</tr>
<tr>
<td>2. MCTF conservation impact profile</td>
<td></td>
<td>(Upon acceptance of deliverables)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. MCTF financial sustainability profile</td>
<td>21 working days</td>
<td>30%</td>
<td>01 October 2020</td>
<td>UNDP CO PIU</td>
</tr>
<tr>
<td>4. MCTF governance structure profile</td>
<td></td>
<td>(Upon acceptance of deliverable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Report on MCTF design validation meeting and recommended follow up action for MCTF launching</td>
<td>5 working days</td>
<td>50%</td>
<td>20 November 2020</td>
<td>UNDP CO PIU</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Upon acceptance of deliverables)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

D. Duration of work: Up to 40 working days over 5 months

E. Institutional arrangement

The international consultant will work for a total of 5 months in close collaboration with the PIU, UNDP CO and relevant stakeholders. The consultant should ensure a timely identification of potential risks and signal any delays in deliverables. The contract will be effective immediately upon signature by UNDP.

UNDP CO shall have the following responsibilities:

- Provide with relevant documents;
- Discuss and agree on the methodologies of the assignment;
- Organize the meetings, workshops and etc;
- Support for participation and involvement of key stakeholders at the meeting;
- Monitor and evaluate the progress of the assignment.

The present ToR may be subject to modification, without changing the overall objective and the scope of work, on the basis of mutual consultations. UNDP will hold the copyright of the assignment deliverables.

F. Qualifications of the Successful Individual Contractor
Education:

- Degree in environmental economics, law, natural resources management, business management or a closely related field, or another field combined with relevant work experience.
- Postgraduate degree in relevant field is an asset.

Experience:

- At least 10 years of experience in design and successful implementation of environmental projects;
- Proven track record on design and establishment of biodiversity Trust Funds;
- Experience in dealing with international and national experts and institutions in both developed and developing nations;
- Strong knowledge on development issues, national policies and the SDGs is mandatory;
- Exposure to and/or strong knowledge on environmental conservation and natural resources management is desirable;
- Previous experience with UN/UNDP and development partners is desirable;
- Good understanding and knowledge of environment sector financing in Central and East Asian countries is an additional asset;

Competencies:

- Highly organized person, sets priorities, produces quality outputs, meets deadlines and manages time efficiently.
- Able to gather and process data and information.
- Excellent interpersonal skills to network among the national team and beyond to other national institutions.
- Writes clearly professional correspondence adequately.
- Shares knowledge and is willing to provide support to others who request advice or help.
- Works toward creative solutions by analysing problems carefully and logically.
- Maintains professional relationships with supervisors, co-workers and clients.
- Sound understanding of key software packages (MS Office)
- Strong oral and written English.

G. Recommended Presentation of Offer

The following documents should be requested:

- Letter of Confirmation of Interest to conduct the assignment;
- Personal CV or P11, indicating all 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 proposed work plan and methodology on how they will approach and complete the assignment.
- Financial Proposal that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs in MNT.

H. Criteria for Selection of the Best Offer

Selection criteria is Combined Scoring method – where the qualifications will be weighted a maximum of 70%, and combined with the price offer which will be weighted a max of 30%.
ToR is Approved by:

Khishigjargal Kharkhuu,
Programme Analyst
UNDP, Mongolia