

TERMS OF REFERENCE (TOR) TO DEVELOP A BUSINESS PLANNING FRAMEWORK FOR PROTECTED AREAS IN BELIZE

Project Title: The Biodiversity Finance Initiative (BIOFIN)

A. Background Information and Rationale

In 2016, the Government of Belize adopted its medium-term development strategy, the Growth and Sustainable Development Strategy (GSDS). Within the GSDS, the Government of Belize highlighted the role of biodiversity management as a critical success factor in acquiring Sustainable Development. This action created a positive and enabling environment for the implementation of Belize's newly developed Biodiversity Strategy and Action Plan (NBSAP) and more specifically the National Protected Areas Policy and System Plan which serve as a road maps for achieving our Biodiversity goals and targets by maximizing the potential of protected areas which serve as Belize's main conservation tool.

In Belize, PA's are the main management tool for biodiversity protection and conservation. PA landscapes cover approximately 36.6% of the national territory and 19.8% of the marine environment. The management of these areas are challenged by financial constraints to acquire and deploy resources for their effective management. A study to develop a Financial Strategy for the Protected Areas System, conducted in 2010 by the UNDP (in collaboration with The Nature Conservancy), found that a funding gap of US\$10.2 million for a basic scenario and US\$ 19.4 million for an optimal scenario existed between current investment and funding needed to operate optimally. The analysis carried out for this strategy, clearly shows that the level of funding is insufficient to sustain management activities.

The Belize National Protected Areas System (NPAS) is primarily financed by the Protected Areas Conservation Trust (PACT) and extra-budgetary sources (grants). PA's however generally face persistent budgetary shortfalls due to the management entity's dependence on donor/grant financing to meet recurrent/operating costs and fluctuation within the tourism industry. For long-term effectiveness of the NPAS, it is critical for PA's to achieve financial sustainability through the growth and diversification of site-level revenue streams, and a reduction on the dependence on external sources (grants).

In this regard in 2016 financial assistance was received from the Biodiversity Finance Initiative (BIOFIN), to quantifying the biodiversity finance gaps and develop a National Biodiversity Finance Plan for Belize. This Finance plan identified sustainable financing mechanisms for implementing the National Biodiversity Strategy and Action Plan and other relevant national policies and frameworks relating to biodiversity.

Also building on recommendations of the Sustainable Financing Strategy for Belize's National Protected Areas System, the GoB via the BIOFIN Project, seeks to strengthen financial sustainability

of PA's through the development and implementation of a National Business Model Framework. This framework will allow PA administrators and managers to determine solutions critical business decisions ahead of time. It will enable the development and implementation of robust site level business plan such as marketing strategy and products and services to be packaged at the site or national level. The result shall be the generation of new and/or additional revenue streams to aid in covering operational and maintenance costs as well as support resilience against financial shocks.

B. Project objective

To strengthen financial sustainability of PA's through the development and implementation of a National Business Model Framework.

C. Scope of Work

Under the guidance of the UNDP and the Biodiversity Finance Initiative the contractor will be responsible to fulfill the following functions:

- i Development of a Business Planning Framework for PA's in Belize. This will guide the development and piloting of business models/enterprises within targeted PA's in Belize. The development of the Business Planning Framework shall consist of.
 - a. Assessment of the benefits and values to be derived from the business models.
 - b. Assessment of the products or services to be developed.
 - c. Market identification - this will entail assessment of which markets are most suitable for products and services.
 - d. Assessment of current and required capacities to deliver on/execute business and investment models/plans.
 - e. Assessment of revenue and management models to ensure sustainability.
 - f. Development of an optimal Business Planning framework.
 - g. Provision of technical guidance on the implementation of appropriate strategies.
 - h. Assessment of the legal/policy framework and development of recommendations to enhance/develop an enabling environment for improved business and financial management practices in PA's.
 - i. Market assessment – initial screening/identification of potential investors in PA's with feasible and sustainable business opportunities.
- ii Foster buy in of all relevant stakeholders by conducting consultation sessions with key stakeholders prior, during and validation phase of this consultancy.
- iii Coordinate closely with the Nation Biodiversity Office, Forest and Fisheries Department, the Association of Protected Areas Management Organizations and the Protected Areas Conservation Trust for the collection of site-level and national level data

D. Deliverables and Expected Outputs

Deliverables/ Outputs	Estimated Duration to Complete	Target Due Dates	Review and Approvals Required
1. Project inception Technical and financial plan	2 weeks	15 th June, 2020	Review by UNDP Programme Analyst and BIOFIN team
2. Second and third progress reports	1 months		
3. First draft report, including the draft business framework	2 months		
4. final validated report inclusive of a summary of the consultancy highlights, learning, innovations, and recommendations	3 Months		

E. Key Performance Indicators and Service Level

Key services required, includes but are not limited to:

- Conduct at minimum 3 site assessments which will inform the National framework.
- Provide technical assistance on financial, legal, and business planning all throughout the consultancy.
- Coordinate and update the GOB and BIOFIN project team on the consultancy progress.
- Close coordination with local governments, indigenous groups, women groups, communities, and any others group to be impacted by business model implementations.

In cases where the required service level is not met by the contractor, the Program Analyst will inform the contractor with concrete instructions to accomplish the deliverables successfully and appropriately. Payment processing will also depend on the acceptance of deliverables.



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F. Governance and Accountability

The contractor will work under the overall guidance of the UNDP and the BIOFIN team with direct supervision provided by the UNDP Environmental Program Analyst and Project Coordinator.

The contractor is required to submit progress report every week.

H. Facilities to be provided by UNDP

UNDP will not provide any facility during the project duration. It will however provide support in logistics arrangement, through the PMU, especially at the onset of the project.

I. Expected duration of the contract/ assignment

The contract will cover ninety (90) days from June 2020 to September 2020.

J. Duty Station

K. Professional Qualifications of the Successful Contractor and its key personnel

Experience of Firm:

Ten years of relevant experience in providing technical assistance on formulating business models.

Proven expertise in protected areas management, ecology, conservation finance, investor relations and business development. Has at least three (1) existing and/or past projects on designing and implementation of finance mechanisms for protected areas or for other business areas.

Has proven established and stable partnership with global institutions and private sector.

Experience working and partnering with various stakeholders such as governments, non-governmental organizations, local communities (eg protected area management bodies); Experience working within the UN system, preferably in an operational UN Agency.

Experience of Personnel:

Business Expert

- At least 5 years working experience as a business development expert.
- A proven track record in business development, planning and implementation.
- Familiarity with Protected Areas services, and experience in technical report writing on ecosystem services;
- Excellent organizational and time management skills.
- Outstanding communication, interpersonal and leadership skills.

Community Development Expert

- Confirmed experience in community development activities, preferably in implementing income generating activities and strategies, micro-finance, and eco-tourism.
- At least 5 years experience working with, and confirmed knowledge of, community-based organizations, NGOs and other civil society organizations operating at the local level.
- Familiarity with socio-economic conditions in terrestrial and marine PA's
- Experience in conducting risk analysis, impact assessments and business models.

Private-Public Partnership Expert

- At least 5 years' experience in leading development and financing conservation enterprise and private-public partnerships (PPPs);
- Demonstrated ability to understand, negotiate, and/or oversee the development of public-private alliances and partnerships related to impact investment in marine protected areas.
- Has knowledge on governance systems and local laws;
- Experience working in development off PPPs is desired.

Environment, Natural Resource or Protected Area Practitioner

- At least 3 years' experience in protected area system, with special attention to institutional management.
- Demonstrated experience in training and capacity building of national stakeholders and institutions related to protected areas;
- Experience in PA management effectiveness.
- Familiarity with management of protected areas in the Philippines, MPA management and planning, eco-tourism related policies;
- Demonstrated leadership and technical abilities to communicate complex ideas verbally and in writing.

Qualifications and / or industry certification and /or demonstrable experience in the following applications: Microsoft Office (advanced user certification of MS Access, MS Excel and MS Word desirable) and Lotus Notes are desirable.

L. Price and Schedule of Payments

% of Payment	Deliverables/ Outputs	Review and Approvals
15%	Completely signed contract and financial proposal June 31 st , 2020	Review by UNDP Programme Analyst and BIOFIN team Approval by UNDP Programme Manager
25%	Submission and acceptance of first and second progress report, including the draft business model, project inception report	
25%	Submission and acceptance of third progress report and draft business model July 2020	
35%	Submission and acceptance and validation of project completion report which summarizes the project highlights, learning, innovations, and recommendations and final report August 2020	

M. Criteria for Selection of the Best Offer

Company profile (relevant experience and qualifications) - 70%

Financial Proposal - 30%

Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience / Expertise of the Firm	200
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	400
	Total	1000

Below is the sub-criteria for each major criteria in order to clearly summarize the above details:

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Reputation of Organization and Staff Credibility / Reliability / Industry Standing	30

1.2	General Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted	90
1.3	Relevance of specialized knowledge and experience on similar engagements done in the region/country	50
1.4	Quality assurance procedures and risk mitigation measures	30
Total Section 1		200

Section 2. Proposed Methodology, Approach and Implementation Plan		Pts attainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	80
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	100
2.3	Details on how the different service elements shall be organized, controlled and delivered	50
2.4	Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement	50
2.5	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	70
2.6	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	50
Total Section 2		400

Section 3. Management Structure and Key Personnel			Points obtainable
3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?		100
3.2	Qualifications of key personnel proposed		
3.2 a	Business Expert		100
	- General Qualification	30	
	- Specific Experience relevant to the assignment	50	
	- Regional/International experience	15	
	- Corporate Qualifications	5	

3.2 b	Community Development Expert		50
	- General Qualification	15	
	- Specific Experience relevant to the assignment	25	
	- Regional/International experience	5	
	- Language Qualifications	5	
3.2 c	Private-Public Partnership Expert		50
	- General Qualification	15	
	- Specific Experience relevant to the assignment	25	
	- Regional/International experience	10	
3.2 d	Environment, Natural Resource or Protected Area Practitioner		100
	- General Qualification	30	
	- Specific Experience relevant to the assignment	50	
	- Regional/International experience	15	
	- Regional/International experience	5	
Total Section 3			400

P. Additional Reference or Resources

- Company profile
- Financial proposal

Q. Submission of Application Package:

Proposals are required to submit in 1 sealed envelope clearly labeled; Consultancy to Develop
A Business Planning Framework for Protected Areas in Belize

United Nations Development Programme
Attn: Procurement Associate
3rd Floor, Lawrence Nicholas Building. Belmopan
Cayo District, Belize, C.A.
Tel: (501) 822-2688, 0467, 4228
Email: procurement.bz@undp.org

Deadline for Application: Extended to Monday, June 29, 2020 at 4:00p.m.