



**REQUEST FOR PROPOSALS / TENDER DOCUMENT
AMENDMENT 1**

CONSULTING FIRM SUPPORT

*CONSULTANCY TO BUILD CAPACITY AND ESTIMATE CARBON
STOCKS FOR CBF EBA FACILITY PROJECTS IN THE CARIBBEAN
REGION*

Date Solicitation is Issued: April 9, 2024

Amendment Date: April 26, 2024

Solicitation Number: 3407.04.05.2024.CBF

Closing Date: May 6, 2024 (Amended)

Closing Time: 11:59 PM UTC-5:00

Entitles That May Apply: Individuals, consortia of individuals, or firms

Contractual Mechanism: Fixed Price

1. Introduction

The Pan American Development Foundation (PADF) and the Caribbean Biodiversity Fund (CBF)'s Ecosystem-based Adaptation Facility are seeking a firm to develop and implement carbon accounting activities for projects supported by the Caribbean Biodiversity Fund (CBF). This consultancy will involve generating baseline data, calculating and estimating carbon stocks, and assessing and estimating the impact of restoration efforts within CBF's Ecosystem-based Adaptation Facility. More detailed information is provided in the Project Overview and following sections below.

About PADF

The Pan American Development Foundation (PADF) believes in creating a hemisphere of opportunity, for all. We work across Latin America and the Caribbean to make our region stronger— more healthy, peaceful, just, inclusive, resilient, and sustainable for current and future generations. For 60 years, we have served the most vulnerable communities, investing resources throughout the hemisphere. We partner with and enable civil society, governments, and the private sector for the greater good of the region.

More information about the Pan American Development Foundation can be found at <http://www.padf.org>.

About the Caribbean Biodiversity Fund

The Caribbean Biodiversity Fund (CBF) is a regional environmental fund whose mission is to ensure continuous funding for conservation and sustainable development in the Caribbean. Established in 2012, the CBF was designed to accommodate the receipt, investment,

distribution and monitoring of conservation funding throughout the region. The 2022-2027 CBF Strategic Plan has three main goals: 1) CBF is an effective institution with exemplary practice standards; 2) CBF grantees and beneficiaries geographically cover more of the Caribbean region; 3) CBF provides sustainable financing opportunities for the Caribbean region.

The CBF has a flexible structure to implement innovative solutions for resource mobilization at the regional level through a range of financial instruments. Currently, the CBF manages a total of USD 175 million, including USD 95 million endowment in its Conservation Finance Program, which aims to support 12 countries across the region, a USD 60 million sinking fund for Ecosystem-based Adaptation – the EbA Facility- which anchors the CBF's Climate Change Program; and a USD 25 million sinking fund for the Advancing of Circular Economy – the ACE Facility which anchors the Nature Based Economies Program. More information about the CBF can be found at <http://www.caribbeanbiodiversityfund.org>.

About the CBF Ecosystem-based Adaptation Facility

The CBF has established a USD 60 million sinking fund for the EbA Facility in 2016, in partnership with the German Government under the International Climate Initiative (IKI) through the German Development Bank (KfW). The EbA Facility finances climate change adaptation measures that incorporate biodiversity conservation and ecosystems management as part of adaptation strategies. The Facility's activities contribute to help people and economies adapt to the adverse impacts of climate change, while also ensuring the resilience of ecosystems in 11 Caribbean island states. Funds allocated to the EbA Facility are expected to be expended by the end of 2030.

The goal of the Ecosystem-based Adaptation Facility is to improve the management and/or rehabilitate ecosystems to strengthen the resilience and reduce climate risks to people in Caribbean Small Island Developing States (SIDS), while also contributing to biodiversity protection and climate change mitigation. EbA Facility projects aim to support effective climate change adaptation measures in the marine and coastal zone of the insular Caribbean. These actions include restoration and rehabilitation of ecosystems, reduction of land-based stressors, other measures to reduce pressures on ecosystems, measures to reduce physical damage to ecosystems, restoration of coral reefs, and grey-green infrastructure (hybrid solutions) relevant to the EbA approach.

Since its operationalization in 2019, the EbA Facility has committed USD 45.4 million and supported 34 Projects implementing EbA approaches in the Caribbean region. Targeted countries of the EbA Facility currently include Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Montserrat, Saint Lucia, and Saint Vincent & the Grenadines. Additionally, Antigua and Barbuda, The Bahamas, Barbados, Saint Kitts and Nevis, and Trinidad and Tobago may benefit through regional projects.

EbA Facility Indicator: Greenhouse Gas Emissions Reduced / Carbon Stocks Enhanced

The EbA Facility is collecting key results through its Monitoring Evaluation and Learning (MEL) Framework (see below), using 17 indicators to measure the EbA Facility's objectives. Three standard indicators were stipulated by the International Climate Initiative (IKI); this consultancy focuses on Action Mitigation – AM:

- **Greenhouse gas emissions reduced or carbon stocks enhanced in project/program area (Action Mitigation – AM)**
- Area of ecosystems improved or protected by project measures (Action Ecosystems – AE)
- Number of people directly supported by the project to adapt to climate change or to conserve ecosystems (Action People – AP)

The Action Mitigation indicator aims to capture the additional potential volume of greenhouse gas emissions stored directly attributable to mitigation activities. In addition, it collects estimates of long-term effects after the project has ended. In line with the UNFCCC's Common Reporting Framework, EbA Facility projects can lead to GHG reduction or carbon stock enhancement in different sectors. These include reforestation and rehabilitation; product use; agriculture and aquaculture (e.g., sea moss); Land Use, Land Use Change and Forestry (LULUCF) (incl. REDD+ activities), and relevant waste management activities, and any other activities which enhance carbon sinks. For further detail, please see [IKI's online seminar on "IKI Standard Indicator 1 – Mitigation"](#)

2. Project Overview

CBF requires support in the calculation of reduced Greenhouse Gas (GHG) emissions or carbon stocks enhanced as a result of EbA Facility projects. The consultancy will review the 14 completed and 12 on-going and 8 incipient EbA projects to: (i) design and receive approval for a workable carbon measurement system for terrestrial and marine ecosystems that is both accurate enough and practical for use on the ground throughout the various projects, and (ii) provide training to up to 25 EbA grant-receiving institutions on methods of measuring GHG reductions or carbon stocks enhanced according international standards, and (iii) provide the requisite documentation for future training on the system. Both terrestrial (green) and marine (blue) carbon are to be considered. The language of this consultancy is English. Competency in Spanish and/or French would be an asset but not required.

3. Period of Performance

The deliverables are expected to be started by May 10, 2024 and to be completed by October 10, 2024.

4. Terms of Reference, Deliverables, and Deliverables Schedule

(All applicable Taxes, Fees, and other costs should be included in the price proposal.)

The estimation of carbon stocks from EbA projects should involve a multidisciplinary team, including a number of key experts. Applying organizations or consortia are asked to present a TECHNICAL PROPOSAL for achieving the proposed deliverables that includes but is not limited to the following factors:

- Relevant subject matter experts (please attach CVs as annexes)
- Data collection/baseline data generation for selected carbon pools
- Type, number of plots, location of measurement and frequency of measurement
- Biomass estimation and carbon stock assessment
- Carbon sequestration calculation
- Ecosystem management/restoration impact assessment
- Remote sensing and GIS Integration as required
- Reporting and communication
- Institutional Capacity Building
- Responsibilities and Project Timeline
- Deliverables
- Cost Application

A schedule of milestones and deliverables is included below. All deliverables should be shared with PADF and CBF for review and approval.

Schedule of Deliverables			
	Estimated Completion Date	Milestone/Deliverable	Description
1	[Date to be determined by Consultant]	Implementation plan	Draft implementation plan for the consultancy and share with PADF and CBF for approval.
2		Methodology for field measurement	Develop detailed methodology for field measurement in different carbon pools and method to estimate carbon sequestration from different projects. Methodology should be sufficiently detailed for replicability.

Schedule of Deliverables			
	Estimated Completion Date	Milestone/Deliverable	Description
3		Methodology for baseline data collection/carbon stock assessment	Develop detailed methodology for baseline data collection and assessment of carbon stock in different terrains. The methodology should be tailored based on an analysis of the projects implemented by the previous and current CBF EbA grantees.
4		Baseline data generated and reported	Collect baseline data and share with collected PADF/CBF both in a raw format and a report including analysis of the baseline data. The methodology of collection should be clearly documented and included in the report. The methodology should be designed to be as replicable as possible. Data on project implementation areas should include the type of terrain, number of plots, location of measurement and frequency of measurement.
5		Training plan	Develop training plan to train PADF and CBF staff as well as the 25 EbA Facility grant-receiving institutions (could be over 25 participants) on how to measure GHG reductions reduced or carbon stocks enhanced, in accordance with international standards. This will include guidelines and capacity-building on how the CBF and PADF (peer-to-peer learning) can support carbon accounting of new projects under a future CBF EbA Facility Calls for Proposals. The institutional capacity building plan, to include a timeline and proposed materials, must be reviewed and approved by PADF/CBF.
6		Training curriculum	Develop training curriculum/manual. Manual should include instructions for future trainers. The training curriculum should be reviewed and approved by PADF and CBF with sufficient time prior to training sessions in order to make changes as needed. The curriculum should include pre- and post- surveys to be completed by participants to measure their knowledge and capabilities.
7		Training sessions	Hold training session(s) with both technical information-sharing (informative, potentially lecture-based) and practical (hands-on, interactive) portions of the training held for PADF and CBF staff and EbA Facility grant-receiving institutions (could be over 25 participants) on methodology and methods of measuring GHG reductions or carbon stocks enhanced. Training sessions can be conducted in a combination of online and in-person

Schedule of Deliverables			
	Estimated Completion Date	Milestone/Deliverable	Description
			modalities. Consultant should track attendance at the training session and gather feedback from participants, for the improvement of future trainings.
8		Training report	Complete training report (template to be provided by PADF). The report should include an analysis of pre- and post- surveys on participants' knowledge and capabilities.
9		Final documentation provided	Provide final copies of required documentation to be approved by PADF and CBF.

Each deliverable should be allocated a percentage of the total cost of the proposal. The total proposed cost of the consultancy can be up to \$130,000 USD. Additional details are included in the cost proposal section below.

5. Cost Proposal

The total cost available for this consultancy is USD 130,000. The cost proposal should be prepared in the attached template. Each element of cost will be evaluated to determine reasonableness and allowability. PADF / CBF will discuss the cost proposal with the applicant and may make adjustments to the budget based on the cost analysis performed.

Cost proposals should include all of the consultant's travel costs. The consultant should propose a cost-effective and efficient implementation plan. For training and travel expenses, training may take place in one or two countries rather than all primary beneficiary countries, and monitoring activities do not need to take place in all primary beneficiary countries. If participants travel to participate in trainings, their travel costs will be accounted for separately from the consultancy budget.

6. Location(s) of Assignment

Remote/Hybrid. Applicants should be willing to travel to complete training and/or conduct monitoring activities. Training participants may travel to a single location instead of consultants travelling to each country. Projects under the EbA Facility are located in the following primary beneficiary countries: Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Saint Lucia, and Saint Vincent and the Grenadines. The Applicants should be able to travel to these

countries. Secondary beneficiary countries of regional EbA projects are: Antigua & Barbuda, Barbados, and Trinidad & Tobago; their contribution should be included via desk studies. The Applicants are encouraged to propose a schedule of remote and in-person activities. Travel to all of these primary beneficiary countries is not required and the consultant should propose a travel plan that takes time and cost-effectiveness into consideration.

7. Technical Evaluation Criteria

The following table outlines the point allocation for each evaluation criterion, providing clarity on the weighting assigned to different aspects of the proposals submitted in response to this consultancy tender.

Technical evaluation criteria and sub-criteria of the tender		Maximum points (out of 100)
1	Approach and methodology	50
1.1	Clarity and completeness of the tender	5
1.2	Comprehension of the TOR	10
1.3	Proposed concepts and methods	35
1.3.1	<i>Data collection/baseline data generation</i>	7
1.3.2	<i>Biomass estimation and carbon stock assessment</i>	7
1.3.3	<i>Carbon sequestration calculation</i>	7
1.3.4	<i>Ecosystem management/restoration impact assessment</i>	4
1.3.5	<i>Reporting and communication:</i>	2

1.3.6	<i>Institutional Capacity Building</i>	6
1.3.7	<i>Responsibilities and Project Timeline</i>	2
2	Qualifications and Experience of the Bidder	40
2.1	Experience and skills of relevant subject matter experts	12
2.2	Organizational profile or overall Consortium composition	10
2.3	English competency	5
2.4	Spanish and French knowledge	4
2.5	Experience providing services/working with conservation organizations, conservation trust funds or civil society.	2
2.6	Regional experience: Small Island Developing States in insular Caribbean	7
3	Budget/Financial Proposal	10
	Total	100

8. How to apply?

- a. Interested consultants shall submit a Proposal addressing the overall concepts and methodologies to attain the works' objectives and deliverables, addressing the evaluation areas contained in the evaluation criteria above. Proposals should be submitted as a PDF or Word document, along with a financial proposal saved as a PDF and Excel file.

- b. The consultant may at his/her own discretion engage some team members to work with him/her to deliver the final product. In this case, the lead consultant remains fully and solely responsible for and accountable to PADF for the timeliness and quality of all deliverables. The lead consultant should submit the CVs of the consultant and his/her selected team members along with the technical proposal. The technical proposal must specify the work assignment for the Team Leader and each consultant. The lead consultant should also submit a cost proposal with break-down detail cost for each consultant.
- c. Proposal shall be submitted by **May 6, 2024** via e-mail to the following addresses: procurement@padf.org and secretariat@caribbeanbiodiversityfund.org with Subject Line: "TECHNICAL PROPOSAL CBF ESTIMATION OF CARBON STOCKS".
- d. Questions may be submitted by April 19 2024 via e-mail to the following address: procurement@padf.org and secretariat@caribbeanbiodiversityfund.org with Subject Line: "QUESTIONS CBF ESTIMATION OF CARBON STOCKS".
- e. Validity of bid: Proposals, including cost/price, shall remain valid for 120 days, from the submission deadline.
- f. Timeline of Events

Request for Proposals Issued	April 9, 2024
Questions submitted to PADF	April 19, 2024
Responses provided to Applicants	April 26, 2024
Complete Proposals Due	May 6, 2024 at 11:59 PM UTC-5:00
Approximate Selection Made	May 8, 2024
Period of Performance for Consultancy	May 10, 2024 – Oct 10 2024

9. Application Checklist

- a. Signed cover page on bidder's letterhead with the bidder's contact information.
- b. Technical Proposal.
 - i. Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
 - ii. Qualifications of Key Personnel. Please attach CVs that demonstrate how the team proposed meets the requirements listed in "Required Experience and Skills"

- iii. Technical Approach, Methodology and Detailed Work Plan. The Technical Proposal should describe in detail how the bidder intends to carry out the requirements described in the Terms of Reference
- iv. Please included completed Budget Template Provided with this Request for Proposals / Tender Document.

10. Requirements for Applicants

1. For firms, entity must be legally registered and able to provide a certificate of registration
2. Able to travel as needed to project sites for training/measurement purposes
3. Meets requirements for experience and skills:
 - a. Advanced Degree in environmental management, environmental sciences, environmental engineering, social sciences, natural resources management, climate change adaptation, project management, statistics or monitoring and evaluation or related field from a recognized university
 - b. At least 7 years of experience working with environmental organizations (regional and local), conservation trust funds and/or civil society in research and development
 - c. Evidence of substantial experience in carbon accounting, including baseline data generation, carbon sequestration calculation, and restoration impact assessment
 - d. Successful track record of capacity building
 - e. Experience in the insular Caribbean Region in conservation, ecosystem-based adaptation, or blue economy issues
 - f. Exemplary verbal and written skills in English. Advanced Spanish and/or French knowledge (conversational, reading and writing) is a strong asset.

11. CBF Documents to Be Shared with Selected Applicant

The CBF will share available documentation with the selected consultant, comprising, but not limited to:

- Operational Manual of the CBF EbA Facility and relevant policies and procedures
- Monitoring Evaluation and Learning Manual of the CBF
- Monitoring Evaluation and Learning (MEL) Plan and Guidelines of its EbA Facility
- MEL plans and technical progress and final reports of EbA projects
- Recent half-yearly reports of the EbA Facility to KfW
- Any other relevant documentation as needed.

12. Terms and Conditions

Resulting Award

This RFP does not obligate PADF to execute a contract, nor does it commit PADF to pay any costs incurred in the preparation or submission of the proposals. Furthermore, PADF reserves the right to reject any and all offers, if such action is considered to be in the best interest of PADF. PADF will, in its sole discretion, select the winning proposal and is not obligated to share individual evaluation results.

Confidentiality

All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. PADF may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. PADF's evaluation results are confidential and applicant scoring will not be shared among bidders.

Protection from Sexual Exploitation and Abuse (PSEA)

As part of the contractor's internal controls and standards of employee conduct, the contractor must ensure that its employees adhere to these standards of conduct in a manner consistent with the standards for United Nations (UN) employees in Section 3 of the UN Secretary-General's Bulletin – Special measures protection from sexual exploitation and sexual abuse (ST/SGB/2003/13).

Contracting with Small, Minority, and Women's Businesses

PADF will take all necessary steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

Debarment and Suspension

Entities that appear on any exclusion lists, System for Award Management (SAM), Office of Foreign Assets Control (OFAC), UN Sanctions List, and other watchlists, will not have their bid evaluated and will not be eligible to receive any subaward that may result from this Request for Proposals.

ANNEX I, VENDOR INFORMATION

Please Annex the following information in your submitted proposal:

VENDOR INFORMATION FORM		
1.	Vendor Type (Please indicate if a Firm or Individual Consultant)	
2.	Registration Status (Please indicate Employer Identification Number, Social Security Number, or other registration number)	
3.	Vendor's Legal Name	
4.	Company Contact full name	
5.	Email Address	
6.	Full Business Address (Including city, country, and postal code, if applicable)	
7.	Category (Not-For-Profit, For-Profit, Other)	
8.	Based in U.S.? (Yes or No)	
9.	Phone Number	
10.	Government Owned Business? (Yes or No)	
11.	Signed and Printed Name	

12.	Date	
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ANNEX II, PADF CODE OF CONDUCT

PADF has an intrinsic set of values which can be categorized by H.E.A.R.T, which are categorized as:

Honesty: We work and express ourselves in an open, transparent, and clear manner.

Excellence: We strive for the highest results and standards, and work with clear and transparent processes deliverables, evidence and rigor. We are committed to those we serve, giving our time, energy and dedication to what we believe in.

Accountability: We pride ourselves on our integrity. We accept responsibility for our actions. We rigorously manage our results, our deliverables, our documentation, and our knowledge.

Respect: We value diversity and other points of view. We are inclusive and empathetic. We foster cooperation, collegiality and teamwork, working together toward the same ends. We seek to create a work environment of decency, working fairness, sincerity and trustworthiness.

Teamwork: We work as ONE PADF committing to our common goals and objectives. We foster cooperation, collegiality and teamwork. We make high-quality decisions as a team. We proactively and openly share knowledge, materials, and expertise. We foster and embrace innovation, creativity and diverse points of view. We are one team.

Offerors and their agents shall at all times act with integrity. Offerors and their agents shall not:

- Offer gifts, employment, and other benefits to Pan American Development Foundation employees and others who are in a position to influence the award of a contract.
- Attempt to seek confidential information in respect to tendering and contract formation processes associated with this RFP from Pan American Development Foundation employees and others who have access to confidential information.

All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with PADF's H.E.A.R.T. values.

Any violation of the Code of Conduct, as well as concerns regarding the integrity of the procurement process and documents, should be reported to PADF via its Ethics Hotline at www.safecall.co.uk/report