

Call for Proposals

Facilitating the Development of a Five-year Strategy for a New Approach to Organizational Development

Opening Date:	15 September 2024
Closing Date:	15 October 2024, 24:00 hrs (U.S. EST)
Questions Due Date:	10 October 2024 (Questions should be sent to cepf@cepf.net)
Submission:	Proposals should be sent to cepf@cepf.net by the closing date.
Location:	CEPF, 2011 Crystal Drive, Suite 600, Arlington VA 22202, USA

1. INVITATION

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement, Conservation International (CI), the European Union, Fondation Hans Wilsdorf, the Global Environment Facility (GEF), the Government of Japan and the World Bank. Established in 2000, CEPF is a global program that provides grants to civil society to safeguard the world's biodiversity hotspots. As one of the founding partners, CI administers the global program through a CEPF Secretariat.

CEPF has a dual mission: (1) supporting conservation of biodiversity within the global hotspots *through* (2) engaging CSOs and strengthening their capacity. CEPF's global results framework, ecosystem profiles (i.e., investment strategies at the biodiversity hotspot scale) and approach to investment emphasize both aspects. To enhance the sustainability of its investments, CEPF's grantmaking is complemented by actions to support the organizational development of its grantees, using proven tools and methodologies.

The CEPF Secretariat intends to engage a consultant to facilitate the development of a five-year strategy for a new approach to organizational development. The consultant shall be required to adhere to CI's code of ethics, statement of work, and the terms and conditions of the contract. This call for proposals does not obligate CEPF to execute a contract nor does it commit CEPF to pay any costs incurred in the preparation and submission of the proposals. Furthermore, CEPF reserves the right to reject any and all offers if such action is considered to be in the best interest of CEPF.

2. BACKGROUND AND OBJECTIVE

CEPF's work on organizational development to date has been largely reactive, addressing technical and institutional challenges encountered by grantee organizations. Organizational development is delivered by the CEPF Secretariat, by locally based Regional Implementation Teams (RITs) that work directly with CSOs to support implementation of grants, and by third parties with expertise in various aspects of technical capacity building and organizational development. Organizational development occurs via any and all of the following:

- Direct support by CEPF and the RIT to grantees, through hands-on mentoring, project development workshops ("grantee masterclasses"), and technical trainings on such topics as financial management, environmental and social safeguards, monitoring and evaluation, and gender.
- Engagement of third parties with expertise in helping local organizations overcome barriers to their organizational development.
- Integration of capacity-building activities into grants, targeted towards grantees' specific capacity requirements.

CEPF's approach is based on the principle that CSOs must lead and take ownership of their own organizational development. Hence, CEPF and its RITs allow grantees considerable flexibility to set their own priorities for organizational development, to select the third parties they will work with, and to decide on the direction and pace of change.

CEPF recognizes that increased effort to ensure the sustainability and resilience of its grantees, is essential to securing long-term biodiversity conservation results. Therefore, looking ahead, CEPF will strive to be proactive and give equal attention to three levels of organizational development:

- Technical (scientific research and monitoring, community engagement, conservation finance, education and outreach, etc.);
- Institutional (organizational structure, financial management, human resources management, communications and information technology, etc); and
- Strategic (mission, vision, values, accountability, governance, decision making, organizational growth, etc.).

The first step in this process will be to facilitate a consultation process involving CEPF's donors, RITs and peer organizations, leading to the development of a five-year strategy for piloting, refining and rolling out a new approach to organizational development across CEPF's global program. A consultant is sought to support this process and to develop the strategy.

3. PROPOSAL SUBMISSION INSTRUCTIONS

Proposals shall be submitted in one volume, in English, and consist of:

- Technical Proposal
- Financial Proposal

Technical Proposal

Should comprise the following parts:

- Technical approach, methodology and detailed work plan. This part shall be between three to five pages long but may not exceed five pages.

The technical proposal should describe in detail how the offeror intends to carry out the requirement described in the scope of work below. The technical proposal should demonstrate a clear understanding of the work to be undertaken and the responsibilities of all parties involved.

- Management, key personnel and staffing plan. This part shall be between two and five pages long but may not exceed five pages. CVs for key personnel may be included in an annex to the technical proposal and will not count against the page limit.

Must have:

- Experience in relevant technical areas, e.g., organizational development (at least five years).
- Master's degree in relevant field, e.g., capacity building/ organizational development, organizational structure and management, with three years of experience, or bachelor's degree with five years of experience.
- Experience working with non-governmental organizations.

Recommended:

- Experience working with conservation organizations.

- Corporate capabilities, experience, past performance and references. This part shall be between two and four pages long but may not exceed four pages.

Financial Proposal

A detailed budget in USD. The budget shall include a budget narrative that explains the basis for the estimation of expenses. If required, supporting information must be provided in sufficient detail to allow for a complete analysis of the cost.

4. PROCESS AND BASIS FOR AWARD

Facilitating the development of the five-year strategy will be undertaken by an independent consultant (individual or firm), selected through a competitive procurement process. Selection of consultants will be overseen by the Monitoring, Evaluation and Outreach Unit within the CEPF Secretariat. Award will be made to the consultant whose proposal is determined to be responsive to this call for proposals, meets the technical requirement, and is determined to represent the most advantage to CEPF.

Evaluation Criteria:

- Technical Approach, Methodology and Work Plan 40
- Personnel Qualification 30
- Past Performance – reference of similar work previously implemented 20
- Lowest Cost 10

Scope of Work, Deliverables and Deliverables Schedule

Development of a Five-year Strategy for a New Approach to Organizational Development

1) Background

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement, Conservation International, the European Union, Fondation Hans Wilsdorf, the Global Environment Facility, the Government of Japan and the World Bank designed to help safeguard the world's biodiversity hotspots. As one of the founding partners, Conservation International administers the global program through the CEPF Secretariat.

CEPF has a dual mission: (1) supporting conservation of biodiversity within the global hotspots *through* (2) engaging CSOs and strengthening their capacity. CEPF's global results framework, Ecosystem Profiles and approach to investment emphasize both aspects. CEPF's grantmaking is complemented by actions to support the organizational development of its grantees, using proven tools and methodologies.

Building upon CEPF's 20+ years of providing capacity support to grantees, the CEPF Secretariat intends to engage a consultant to develop a five-year strategy for a new approach to organizational development that will be implemented across its global grant-making program.

2) Objective of the Consultancy

The objective of the consultancy is to facilitate consultations with CEPF's grantees, donors, staff and RITs, as well as experts in the field of organizational development, and to develop a five-year strategy for a new approach to organizational development, to be implemented across CEPF's global program. The process to develop the strategy will entail consultations (virtual and in-person), and extensive interaction with CEPF staff during the process, to ensure full understanding of CEPF and to allow CEPF staff to contribute their views and experience throughout. The strategy will identify objectives, approach, roles and responsibilities, diagnostic tools and metrics to gauge success, an estimated budget and plans for piloting the strategy in selected biodiversity hotspots.

3) Duties

The consultant is required to facilitate a consultation process to inform development of a five-year strategy for a new approach to organizational development for CEPF, and to develop the strategy and associated tools, in the context of the above-mentioned objective (Section 2). The consultant is required to field a team with experience in capacity building and organizational

development (OD). The consultancy will include the following tasks:

Consultations

- Work with CEPF staff to organize a series of consultations (virtual and in-person) to inform the development of the strategy.
 - Organize consultations as needed with OD experts and entities to inform the development of the strategy.
 - Organize consultations with the CEPF Secretariat and selected RIT staff to ensure the consultancy is addressing needs in the biodiversity hotspots and to discuss recommended OD actions.
 - Arrange a series of meetings to ensure that the CEPF Secretariat and selected RIT staff interface with key entities and experts in the field of OD.
 - Consult with selected grantees, to gauge views and needs related to OD.
 - Present elements of the strategy to CEPF's donors, including at meetings of the Working Group (January 2025) and Donor Council (February 2025), and incorporate their feedback in the development of the strategy.

Objectives and approach

- Determine what OD means in the context of CEPF.
- Determine the objectives of the OD strategy.
- Determine the approach that CEPF should adopt to deliver the strategy.
- Identify the various options available for delivery of OD (e.g. coaching, training, peer to peer exchanges, etc.).
- Where feasible, determine estimates of cost of delivery of OD.
- Compile a list of organizations/entities suitable to support CEPF to deliver OD, with descriptions of their OD experience and expertise.
- Review diagnostic tools and develop a tool(s) for CEPF to use to identify grantees interested in OD and determine what their needs are.
- Determine a timeline for roll out of the strategy across the global program, and piloting in selected hotspots.
- Ensure there are opportunities for discussion and feedback with CEPF and RIT staff throughout the process.

Metrics

- Design a monitoring framework with appropriate metrics to measure the impact of CEPF's investments in OD.

Roles and responsibilities

- Determine the role the CEPF Secretariat in delivering OD across the biodiversity

hotspots.

- Determine the role the regional implementation team will have in delivering OD across their biodiversity hotspot.
- Ascertain future staffing needs in the CEPF Secretariat and RITs, to ensure delivery of the strategy.
- Determine what OD elements would best be delivered by third party entities.

The evaluation will begin with a brief desk review based on the following information/documentation:

- CEPF's core documents (e.g. Operational Manual).
- CEPF's capacity building program (Civil Society Tracking Tool, current metrics, reports highlighting capacity building efforts).
- Material prepared by CEPF to support the expanded emphasis on OD.

The desk review will be followed by interviews, consultations, and group meetings with CEPF Secretariat staff, RIT staff, a selection of CEPF grantees, OD experts and entities, and other relevant stakeholders. The consultancy will include virtual and in-person consultations/meetings. The consultant will be expected to organize selected meetings with stakeholders, while others will be organized in collaboration with CEPF staff.

Travel and other expenses for participants to attend in-person consultations will be paid for separately and will not be a part of this contract.

4) Deliverables

The consultancy will have the following deliverables:

1. A draft five-year global strategy for a new approach to organizational development (in English).
2. A final five-year global strategy for a new approach to organizational development (in English), incorporating feedback from stakeholders.
3. A set of diagnostic tools for CEPF to use to identify grantees interested in OD and determine what their needs are.
4. A list of organizations/entities suitable to support CEPF to deliver OD, with descriptions of their OD experience and expertise.
5. A monitoring framework with appropriate metrics to measure the impact of CEPF's investments in OD.
6. A PPT presentation to be delivered virtually at a meeting of the CEPF Working Group in January 2025, to present work to date and gather donor feedback.

7. A PPT presentation to be delivered virtually at a meeting of the CEPF Donor Council in February 2025 to present work to date and gather donor feedback.
8. A virtual briefing for the CEPF Secretariat to include a presentation of the completed strategy and associated materials, and reflections on the process conducted to undertake the work.

5) Timeframe

The consultancy will be conducted between 1 November 2024, and 30 April 2025. The draft strategy will be prepared no later than 15 March 2025 and submitted to the CEPF Secretariat for review. Final deliverables, incorporating comments from the CEPF Secretariat, will be completed by 30 April 2025.

The consultant shall also provide the CEPF Secretariat with periodic verbal briefings and meet with Secretariat staff, as requested.

The total amount of time for the assignment is 50 days and should include: allocations for literature review and interviews/consultations with CEPF Secretariat staff, RIT staff, grantees, OD entities and other stakeholders; preparation of the draft deliverables; virtual participation in meetings of the CEPF Working Group and Donor Council; a briefing for the CEPF Secretariat on the findings; and finalization of deliverables following incorporation of Secretariat comments.

6) Funding for in-person Consultations

Travel and other expenses for participants (including the consultant) to attend in-person consultations will be paid for separately and will not be a part of this contract. The number of participants and location of in-person consultations will be determined in collaboration with CEPF staff.

7) Reporting

The consultant will work under the close supervision and direction of the senior director for Monitoring, Evaluation and Outreach, or any other individual that the CEPF Secretariat may designate.