

Request for Proposals

Establishing a Pacific Regional Climate Finance Help
Desk



1.0 Introduction to CTIF

The Canadian Trade and Investment Facility for Development is a seven-year, CAD \$11.6 million demand-driven program aligned with Canada’s Feminist International Assistance Policy (FIAP) to support sustainable trade and investment-related policy reforms and economic development initiatives that promote women’s empowerment and inclusive growth and have a high potential to reduce poverty in ODA-eligible developing countries in the Asia-Pacific region. CTIF provides technical assistance based on the needs identified by potential beneficiaries and according to an assessment process jointly administered by the CTIF team and Global Affairs Canada (GAC). Technical assistance is provided by independent suppliers that specialize in the specific services being requested by the beneficiary. Cowater International (www.cowater.com) and the Institute of Public Administration of Canada (www.ipac.ca) jointly implement CTIF on behalf of the Government of Canada.

2.0 Assignment Overview

Consultancy title:	Establishing a Pacific Regional Climate Finance Help Desk
Beneficiary Organizations:	Pacific Centre for the Environment and Sustainable Development (PaCE-SD) - University of the South Pacific (USP)
Anticipated duration:	12 months
Anticipated start date:	November 2020
Location of assignment	Consultant’s Home Office (remote); Suva, Fiji (if possible)
Summary of assignment	USP’s PaCE-SD has been delivering climate change and disaster risk management courses that are tailored to meet the needs of its member countries. PaCE-SD/USP enjoys a very close network of climate advocates dating back to 2011, when its accredited postgraduate program was launched. Since 2012, over 290 students have passed through its Climate Change Program, more than 20 students have contributed to the UNFCCC COP negotiations, 150 trainers have been trained, and over 200 community members have been supported in building their resilience towards climate change impacts. Furthermore, following requests from PIC governments, the PaCE-SD also developed a Climate Finance and Adaptation Project Design course to build PIC capacity to secure climate finance. After three years of offering the course, PaCE-SD is clear from its own observations and consultations with participants that additional permanent, reliable and flexible technical support is necessary to help PICs identify and develop fundable climate change adaption or mitigation projects.
Terms of Reference	See Annex 1
Maximum budget, excluding HST	CAD \$150,000

3.0 Corporate Qualifications

Interested bidders must possess the corporate capabilities and experience described in Annex 1 (TORs), which can be evidenced through project profiles included in technical proposals using the form provided in Annex 2. Contracts for projects profiled by bidders must have been active within the last five calendar years dating from the date of the release of this tender document.

4.0 Proposal Validity

A proposal must remain valid and open for acceptance for a period of 90 days after the closing date of RFP.

5.0 Team Member Qualifications

Bidders must provide CVs for the team members it proposes to undertake the assignment on behalf of CTIF and the beneficiary using the format provided in Annex 3.

6.0 Conflict of Interest – Unfair Advantage

In order to protect the integrity of the procurement process, the Bidders are advised that CTIF may reject a bid in the following circumstances:

- a. if the Bidder, any of its proposed Personnel including any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation;
- b. if the Bidder, any of its proposed Personnel, including any of their respective employees or former employees, was involved in any other situation of conflict of interest or appearance of conflict of interest;
- c. if the Bidder, any of its proposed Personnel including any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other Bidders and that would, in CTIF's opinion, give or appear to give the Bidder an unfair advantage; or,
- d. If the Bidder, its employees, or any of its proposed Personnel are related to an owner or employee of the Beneficiary or are currently working with the Beneficiary in a volunteer or paid capacity as an employee, consultant or director (board member).

7.0 Rights of Cowater International/IPAC:

As CTIF's lead executing agency, Cowater/IPAC reserve the right to:

- a) reject any or all Proposals received in response to the RFP;
- b) enter into negotiations with Bidders on any or all aspects of their Proposals;
- c) cancel the RFP at any time;
- d) reissue the RFP;
- e) if no compliant Proposals are received and the requirement is not substantially modified, reissue the RFP by inviting only the Bidders who responded to resubmit Proposals within a period designated by Cowater; and
- f) negotiate with the sole compliant Bidder to ensure best value to DFATD.

8.0 Coordination and Reporting

The Service Provider will be contracted by Cowater International and report to the CTIF Project Manager. More details on reporting requirements are provided in the attached TORs.

9.0 Proposal Structure and Evaluation Methodology

Proposals will be evaluated using the cumulative analysis method. The proposal with the highest cumulative scoring will be awarded the contract. Applications will be evaluated technically and financially, and points will be attributed based on the assessment criteria detailed below.

Technical Proposal and Evaluation Criteria

The format and content of technical proposals shall align with the structure and content provided below.

Table 1: Proposal structures and scoring methods

Content	Details	Weighting	Max Score	Page Limit ¹
Experience	Experience managing or implementing assignments of a similar nature in a similar geographic context.	12	72	10 pp. ²
Proposed approach and methodology	Quality of the proposed approach and methodology for delivering the assignment's intended results, including a detailed workplan and work schedule, and performance framework integrating the assignment's intended results and CTIF's intended outcomes.	12	72	8 pp.
Project management and oversight	Quality of proposed approach to project management, including monitoring and reporting.	4	24	2 pp.
Proposed team	Quality and relevance of the proposed team members' skills and experience	12	72	10 pp. ³
Technical criteria	Total score:	-	240	-

Scores of 0 – 6 noted above shall be awarded based on the interpretations in Table 2 below.

Table 2: Score Attribution Criteria

Score	Criteria
6	Demonstrates expert understanding of the TORs and proposes innovative and appropriate solutions that address all requirements. Responses are well-tailored to the client's requirements in all aspects. Level of detail and quality of information provide a high degree of confidence in certainty of delivery.
5	Demonstrates a strong understanding of the issues in the TORs. Responses are tailored in most aspects and includes some innovation. The detail and quality of information provided gives a strong level of confidence that the requirement will be delivered to a high standard.
4	Demonstrates a good understanding of all issues relating to delivery of TORs. Responses are tailored to the client's requirements in some respects and demonstrate that proposals are robust. Provides sufficient detail and quality of information to give a good level of confidence that they will deliver.
3	Some misunderstandings of the issues relating to delivery of the TORs. Poor appetite to tailor to the client's requirements where required. Generally, a low level of quality information and detail leading to insufficient confidence that they will deliver.
2	Major misunderstanding of the issues set out in the TORs. The information is poorly tailored to the requirements or of a low quality. Poor quality or lack of information provides a low level of confidence that they will deliver.

¹ Use Ariel 10, normal margins.

² Bidders shall utilize the project profile template provided in Annex 2 to complete this section.

³ Bidders shall utilize the CV template provided in Annex 3 to complete this section.

1	Complete failure to address all material requirements of the TORs. Little or no tailoring of responses to meet customer requirements. Poor quality responses providing little or no confidence that they will deliver.
0	Unresponsive or non-compliant.

Only bids receiving a minimum score of 70% against the technical evaluation criteria will proceed to the financial evaluation stage.

Financial Proposal and Evaluation Criteria

Financial proposals must be in CAD and include all applicable taxes on a separate line. Payments will be made to the Supplier based on milestones connected to each deliverable for **Fees** and actual receipts for **Reimbursable Expenses**. Financial proposals must be sufficiently disaggregated to allow evaluators to achieve a clear understanding of where resources will be invested to ensure value for money. To this end, financial proposals must include the following line items:

Fees:

- Names, titles and all-inclusive daily rate per team member
- Level of effort per team member
- Deliverable / Report.

Reimbursable expenses include⁴:

- International flights for trainers and trainees
- Daily allowances for trainers and trainees in accordance with NJC Travel Directive⁵
- Accommodation for trainers and trainees
- Local transportation & miscellaneous travel expenses
- Office space and/or venue rental
- Communications & reporting expenses

Reimbursable expenses will be subject to negotiation prior to contract award and subject to CTIF approval prior to reimbursement, which will be at cost.

CTIF **will not** reimburse costs for normal tools of trade (e.g. portable personal computers)

The selected Service Provider will be solely responsible for arranging and payment of adequate health, dental, medical and accident insurance coverage for all its Experts working on this project. The Service Provider shall also make reasonable efforts to ensure the individuals engaged in the delivery of this project obtain immunizations and out-of-country travel insurance as required.

Financial proposals shall be evaluated as follows:

The following calculations will be used to determine your commercial score:

Commercial Criteria	Comment	Weighting
Competitiveness of fees	Mathematical calculation of competitiveness of the proposed daily fees in direct comparison to all tenderers in this competition. Lowest proposed fees/your proposed fees x 100	80

⁴ Receipts must be retained for all expenses; the list of expenses is not exclusive.

⁵ <https://www.njc-cnm.gc.ca/directive/d10/en>

Competitiveness of expenses	Mathematical calculation of competitiveness of the proposed expenses in direct comparison to all tenderers in this competition. Lowest proposed expenses / your proposed expenses x 100	20
-----------------------------	--	----

Determining best value offer

The weight given to the technical and commercial tenders are:

- Technical: 80%
- Commercial: 20%

Your total score will be determined using the following formula:

Technical score x 0.8 + Commercial score x 0.2 = Final score

10.0 RFP Timeline

CTIF will solicit proposals based on the timeline identified below:

Action	Date ⁶
Request for Proposals (RFP) issued	September 18, 2020
Deadline for confirming intention to bid ⁷	September 25, 2020
Bidders Clarifications Deadline	October 2, 2020
Proposal submission deadline	October 19, 2020, 5pm EST
Proposal evaluation complete	October 22, 2020
Notification provided to selected bidder	October 25, 2020
Service Order or Contract finalized	October 30, 2020
Notifications sent to unsuccessful bidders	November, 2020
Anticipated project start date	November 2, 2020

11.0 Proposal Submission Details

Your proposal should be submitted in English and be set out in three main parts. The Technical Proposal should be submitted in accordance with the Scoring Methodology and Evaluation Criteria and consist of:

- Part A: Executive Summary (one page)

The proposal must be accompanied by a letter on your organisation letterhead showing the full registered and trading name(s), trading and registered office address of the Potential Supplier and, in the case of a company, the place of incorporation. It should be signed by a person of

⁶ The RFP timeline is subject to change and in such case CTIF will notify all interested parties accordingly.

⁷ Mandatory: confirmations are to be sent via email to info@c-tif.ca.

suitable authority to commit the Potential Supplier to a binding contract. You must quote the RFP Title.

- Part B: Contents page

1. Past experience (**Annex 2** template)
2. Proposed approach and methodology (narrative and **Annex 5** template)
3. Project management and oversight
4. CVs of the proposed team (**Annex 3** template).

- Part C: Financial Proposal (**Annex 4** template)⁸ and a Rate Justification Form filled out for each proposed expert, who is not covered by the Standing Offer Agreement with CTIF (**Annex 6** template).

Proposals shall be submitted to CTIF by **October 19, 2020 5pm EST**, by email to: info@ctif.ca

Proposals can be submitted by a single supplier, a consortium or a joint-venture arrangement.

Proposals must be submitted in two separate pdf format files. These may be attached as part of the same email.

- a. Parts A and B – Technical Proposal
- b. Part C – Financial Proposal (**should be password-protected**).

We will request the password if your proposal is deemed technically compliant. Any submission of the financial proposal that is not password-protected will be disqualified. **Also, any submission of the financial proposal together with the password will be disqualified.**

Proposals shall be submitted to CTIF using the following subject lines:

- CTIF– 043-USP-Fiji – Technical Proposal
- CTIF – 043-USP-Fiji – Financial Proposal

CTIF will confirm receipt of your proposal.

12.0 Questions

Bidders may submit to CTIF questions and/or requests for additional information, including, without limitation, inquiries related to substantive portions of the RFP, timing, clarifications related to definition or interpretation of this RFP. All questions and/or requests must be submitted in writing by email to Natalia Barankevych at natalia.barankevych@cowater.com on or before **October 2, 2020**. CTIF will respond to a timely submitted question and/or request for clarifications by issuing addenda and/or response, which will be sent out to all the parties, who expressed interest in bidding on this project.

In the event you are the selected Service Provider in this procurement process, you will be expected to sign Cowater Sub-contractor Agreement and its General Terms and Conditions. A copy of this standard Agreement may also be requested from the CTIF team.

CTIF looks forward to receiving your proposal and thanks you in advance for your interest in CTIF procurement opportunities.

⁸ The budget template can be modified by the bidder.

Annex 1: Terms of Reference

Mandate Title:	Establishing a Pacific Regional Climate Finance Help Desk
Beneficiary Name:	Pacific Centre for the Environment and Sustainable Development (PaCE-SD) - University of the South Pacific (USP)
Consultant:	To be selected through CTIF procurement process

1.0 Background

UN Framework Convention on Climate Change (UNFCCC)

It has been well established that the impacts of climate change are not experienced equally across countries and within societies. At the country level, there are geographic and socio-economic conditions that lead some countries to be more vulnerable than others. The Pacific Island Countries (PICs) – Kiribati, Solomon Islands, Tuvalu, and Vanuatu, in particular – are among the most vulnerable countries on the planet. This is due to geography, but also due to their economies' high dependence on natural resources and primary sector activity.

To begin to address the challenges posed by climate change, PICs have ratified the Paris Agreement to the UNFCCC and made voluntary commitments to reducing greenhouse gas emissions and support climate and disaster resilience through their Nationally Determined Contributions (NDCs). They have reflected these commitments in strategic planning and policy frameworks, including National Adaptation Plans (NAPs), but governments have faced difficulties in financing their implementation. These difficulties, in turn, hinder PICs abilities to build resilience and adaptive capacity and to shift to low-carbon development trajectories. They can also deter foreign investment because of high climate-related risks.

Pacific Island Forum Commitments

In its 2012 annual meeting, the Pacific Island Forum (PIF) tasked its secretariat to work with agencies across the region to respond effectively to climate change, including by increasing access to international sources of climate finance. In August 2019, the PIF Secretariat released its first Regional Synthesis Report of the Pacific Climate Change and Disaster Risk Finance Assessment conducted in 10 PICs.⁹ The assessments revealed significant limitations across seven pillars that demonstrate how climate financing is a crosscutting issue linked to national development, planning and budgeting. At least four of these pillars are common across all PICs and directly related to the envisioned Help Desk.

Pillar	Details and Link to this CTIF Mandate
Pillar 3: PFM and Expenditure Analysis	Considers the strength of a country's public financial management (PFM) systems and the extent to which fiscal policy is sustainable, whether expenditure is having the desired effect on achieving policy objectives and whether there is value for money in service delivery. The Help Desk can support improved budget development and with identifying financial mechanisms in-country.
Pillar 5: Human Capacity Analysis	Assesses the ability of individuals to manage programmes and projects; individual attitudes, knowledge, behaviour and actions; and how a country manages and develops the awareness, understanding and skills of its human resources. The Help Desk will address these human capacity issues to empower countries to better access climate finance.
Pillar 6: Development Effectiveness Analysis	Considers the links between climate change, ownership, leadership, alignment, harmonisation, and managing for results and mutual accountability for ODA. The difficulty for government-led stakeholder engagement to provide the space for dialogue to better access and use ODA is a gap that the establishment of a climate finance Help Desk can address across the countries.

⁹ www.forumsec.org/wp-content/uploads/2019/09/PCCFAF-Synthesis-Report_2019_Web-Version.pdf

Pillar 7: Gender Equity and Social Inclusion	Assesses how gender elements integrate into the daily functioning of different government and community organizations in relation to climate change adaptation and disaster risk reduction functions. The Help Desk will support compliance with best practice on GESI policies, mainstreaming, and environmental and social safeguards of the major climate finance funding agencies.
---	--

Building off of these findings, the USP’s PaCE-SD has been delivering climate change and disaster risk management courses that are tailored to meet the needs of its member countries. PaCE-SD/USP enjoys a very close network of climate advocates dating back to 2011, when its accredited postgraduate program was launched. Since 2012, over 290 students have passed through its Climate Change Program, more than 20 students have contributed to the UNFCCC COP negotiations, 150 trainers have been trained, and over 200 community members have been supported in building their resilience towards climate change impacts. Furthermore, following requests from PIC governments, the PaCE-SD also developed a Climate Finance and Adaptation Project Design course to build PIC capacity to secure climate finance. After three years of offering the course, PaCE-SD is clear from its own observations and consultations with participants that additional permanent, reliable and flexible technical support is necessary to help PICs identify and develop fundable climate change adaptation or mitigation projects.

Gender Equality and Social Inclusion (GESI)

As noted above, climate finance is linked directly to the topic of gender equality and social inclusion. For instance, due to gender roles in many PICs, women and indigenous groups are often more vulnerable to the consequences of external shocks (e.g. tropical cyclones) and stressors (e.g. increasing temperatures) associated with climate change. If not adequately addressed, climate change will therefore exacerbate the factors that contribute to poverty and gender/social inequities in PICs.

This being the case, countries applying for climate financing always need to address GESI and Environmental Social Safeguards (ESS) for a successful proposal; however, PICs often have difficulty adhering to such complex requirements and high international standards. Many are not equipped with the appropriate skills or knowledge to propose projects that address the gender-differentiated impacts of climate change, and which provide gender- and socially equitable approaches to building resilience. These challenges noted by the USP/PaCE-SD echo a recent article on the topic of TA for climate finance, in which a specialist noted that many developing countries *“struggle to make the economic case for climate projects, they often don’t have the data ready to be able to clearly articulate the climate rationale, and then they lack the technical skills to demonstrate the technical and financial requirements that would underpin a well-prepared project proposal.”*¹⁰

2.0 Related Donor Activities

Recent or ongoing initiatives or outputs of donor-financed projects of relevance to this mandate include but are not limited to those listed below. These projects, which have limited time horizons, routinely provide PICs with assistance in designing climate change project proposals (e.g. NAPs and general ‘readiness’) for GCF and other financiers, in conducting GESI and ESS analysis for project development, and other tasks. While these initiatives are responding to the needs of the region, their time-limited nature and sustainability remains an issue. The Help Desk that is the focus of this CTIF mandate will be able to complement and build on these initiatives and further sustain them by incorporating the support into existing institutional structures of USP/PaCE-SD. Assistance can then be delivered by experts residing permanently in the region.

Initiative	Partner(s)	Years
Coping with Climate Change in the Pacific Islands Region (CCCPIR) Project: This regional project led by the Secretariat of the Pacific Community (SPC) aims at strengthening the capacities of PICs and regional organisations to cope with the anticipated effects of climate change that will affect communities across the region. CCCPIR focuses	BMZ/GIZ/SPC	2009-2020

¹⁰ Skylar Bee, NDC Partnership, in Worley, William, “A development practitioner’s guide to technical assistance for climate finance,” ‘Inside Development’, Devex, 19 August 2020. www.devex.com

on key economic sectors such as agriculture and livestock, forestry, fisheries, and tourism.		
Institutional Strengthening for PICs to Adapt to Climate Change Project (ISACC): Led by the SPC in partnership with the Secretariat of the Pacific Regional Environment Programme (SPREP) and the Pacific Islands Forum Secretariat (PIFS), the goal of this regional project is to strengthen the national institutional capacity of PICs to effectively plan, coordinate and respond to the adverse impacts of climate change. Funded by ISACC, PaCE-SD delivered a Project Monitoring and Evaluation course attended by Government officials and civil society organizations from Fiji, Nauru, Kiribati, Marshall Islands, Solomon Islands, Samoa, Tonga and Vanuatu.	USAID/SPC/ PIFS/SPREP	2015- 2020
Climate Ready Project: This project works with PICs and regional stakeholders to: (1) draft and implement policies to achieve national adaptation goals; (2) access and utilize international sources of climate financing; and (3) improve systems and expertise to better manage and monitor adaptation projects. Through Climate Ready, PaCE-SD delivered a climate finance course for senior government officials from Fiji, Kiribati, Solomon Islands, Samoa, Tonga, Tuvalu, and Vanuatu. The Project has also signaled its intention to provide complementary and follow-up support to PaCE-SD to build on and strengthen the CTIF investment in technical assistance.	USAID/DT Global	2017- 2022
Commonwealth Climate Finance Access Hub: The Hub helps small and vulnerable states secure funding to tackle climate change. Commonwealth climate finance experts deployed through the Hub act as national advisers assisting member countries in building their in-house climate finance expertise related to accessing funding; develop policy frameworks; achieving national sustainable development priorities; and, setting up projects to tackle climate change. Tonga is the sole PIC to have received TA from deployed experts thus far. ¹¹	Commonwealth Secretariat	2016- 2020
Statistical Innovation and Capacity Building in Pacific Islands: This regional statistics project aims to help close data gaps on poverty and gender in the Pacific. The project will support the Statistics for Development Division (SDD) of the SPC to strengthen its role as a 'statistical system leader', promote innovation and better disseminate the recommendations from the Pacific Statistics Methods Board. The SPC-SDD will also work with the National Statistics Offices in Tonga and Kiribati to modernize their data collection processes so as to improve the comparability, accessibility and sustainability of statistics across the region. Additional countries are expected to join the program in the future.	World Bank	2020- 2025
Save the Children is collaborating with PaCE-SD to provide support to Solomon Islands and Vanuatu to access Climate Change Funds from the Green Climate Fund.	Save the Children	Ongoing
Pacific Technical and Vocational Education and Training on Sustainable Energy and Climate Change Project (EU PACTVET): The project aimed to enhance Pacific regional and national capacity and technical expertise to respond to climate change adaptation and	EU/PSC/USP	2014- 2020

¹¹ Source: <https://thecommonwealth.org/climate-finance-access-hub>

sustainable energy challenges. The project was implemented by the SPC in partnership with the University of the South Pacific.

Experience from USAID’s ISAAC and Climate Ready technical support facilities demonstrate a high level of demand for the types of services the envisioned Help Desk will offer. Some PICs that have directly requested PaCE-SD’s support to prepare Green Climate Fund (GCF) readiness project proposals include Nauru, Kiribati, and Solomon Islands. Looking forward to 2021 and beyond, the recently awarded contract to implement USAID’s Pacific American Partnership Fund, along with the existence of other development-partner funded initiatives will ensure that there is a steady demand for the Help Desk’s services in the foreseeable future.

3.0 Linkage to CTIF Performance Measurement Framework

This mandate aligns with CTIF Immediate Outcome 1220: *Increased capacity of civil society organizations¹² and individual firms (especially women-led businesses) to support their constituencies in areas such as business growth, women’s economic empowerment, market access, access to finance, and responsible business conduct.*

4.0 Description of the Assignment

Objectives

CTIF has agreed to provide technical assistance to the USP’s Pacific Centre for the Environment and Sustainable Development (PaCE-SD) to support the development of a permanent climate finance Help Desk facility. Through the Help Desk, PICs will be able to access technical assistance needed to access financing from international sources that will assist them in implementing their climate change mitigation and adaptation projects and actions.

The Help Desk will build on the PaCE-SD’s existing postgraduate Climate Finance and Adaptation Project Design course. The Help Desk will provide for flexibility to ensure it continues to deliver targeted technical support based on the unique and evolving needs of member countries. The Help Desk will also research collaborations with other faculty and disciplines where climate financing is crosscutting; research opportunities can inform policy and lead to informed decision-making for government and non-governmental stakeholders. Services provided by the Help Desk will also promote environmental sustainability and will advance climate change adaptation and mitigation.

TA services will include analyzing existing PaCE-SD staff job descriptions and aligning them with the staffing needs of the Help Desk; identifying roles for USP graduate students to advance the Desk’s mandate while providing important practical experience; human resource capacity building, including training of trainers; preparing training materials; supporting the establishment of a gender-sensitive and socially inclusive monitoring and evaluation (M&E) framework; preparing a gender equality strategy to inform the Help Desk’s assistance with the development of gender-responsive climate change projects; institutionalizing the Help Desk within the organizational structure of PaCE-SD; and, supporting the preparation of a business plan through which the Help Desk will gradually be able to access a combination of grants and user fees to finance its sustainability.

The anticipated impact of this CTIF mandate includes:

- Improved concept note/project identification and design leading to more projects being developed by PIC National Designated Authorities (NDAs),¹³ which ultimately will lead to scaled up financing for resilience-building projects in the PICs;
- Improved capability of PICs to meet their international obligations (e.g. NDCs, NAPs);
- Improved integration of GESI and ESS considerations and greater participation of women and girls in climate projects to ensure they contribute to social equity, environmental sustainability, and the achievement of the SDGs in PICs;

¹² This category includes non-governmental organizations, academic institutions, labour unions, professional associations, indigenous groups, faith-based organisations, and foundations.

¹³ See here to identify PIC NDAs: www.greenclimate.fund/about/partners/nda

- Greater country and regional ownership over climate adaptation and mitigation activities, including through a stronger base of expertise within PICs related to accessing climate finance and improved capabilities among climate leaders based in all 12 University of the South Pacific campuses.
- Greater networks established between PaCE-SD financing institutions and NDAs who can access GCF funding, such as the Fiji Development Bank and the Micronesian Conservation Trust.

Beneficiaries

The direct beneficiary of this CTIF TA mandate will be the University of the South Pacific's Pacific Centre for the Environment and Sustainable Development (USP-PaCE-SD). Within the PaCE-SD, individual beneficiaries will include staff and students who are directly engaged in climate finance studies and education. Most are graduate students and PIC government officials. Indirect beneficiaries will include government and non-governmental stakeholders in PIC countries.

Technical Assistance Activities

As part of this CTIF TA package, the Consultant will be responsible for delivering the following activities and deliverables.

4.1 Framework and Tools for the Establishment of a Climate Finance Help Desk at PaCE-SD

This first activity will begin with a desk review and bilateral consultations with PaCE-SD staff and representatives from each of the constituent countries – including at least one virtual consultation per PIC member – to determine internal and specific country needs with respect to capacity development.

Informed by this analysis, desk research and these consultations, the Consultant will prepare a framework and tools supporting the establishment of the planned Climate Finance Help Desk at PaCE-SD. While details will be further defined with PaCE-SD during the project's inception stage, this will include:

- Preparing an updated inventory of other relevant donor-supported projects and resources/materials produced by these projects of relevance to the Help Desk and for use by future Help Desk staff;
- Annual consultations and updates with countries on capacity development priorities;
- Recommendations to inform the Help Desk's overall 'scope of services', first annual workplan, and other organizational considerations;
- A draft Standard Operating Procedures Manual for future Help Desk staff to guide day to day operations and delivery of technical support to PIC beneficiaries;
- Selected guidance notes on technical material related to climate finance proposals on which Help Desk staff will be able to draw while providing assistance to PIC beneficiaries;
- A draft Human Resources Plan for the Help Desk, including alignment of existing staff TORs with Help Desk requirements and defining possible roles for USP graduate students;
- A draft Help Desk Communications Strategy and Protocols document;
- A draft gender-sensitive Monitoring and Evaluation (M&E) Framework that will enable the Help Desk to efficiently monitor and evaluate the impact of its support across participating PICs;
- A draft Gender Equality Strategy to inform the Help Desk's development of gender-responsive climate change projects; and,
- A high-level Business Plan identifying anticipated operating expenses and how the Help Desk may gradually be able to access sufficient revenues through a combination of grants and user fees to finance its sustainability.

4.2 Workshop and Training for USP/PaCE-SD staff to provide Help Desk Services

Following the conclusion of activity 4.1, the second activity will consist of targeted capacity building (training) for Help Desk staff. The training will be conducted remotely via online webinars using Zoom or equivalent platforms and via an in-person (face-to-face) workshop at USP in Suva by the Consultant if travel restrictions permit.

Training delivery will include practical sessions on climate finance grant proposal development and cover the key deliverables produced through Activity 4.2. The objective of the training will be to ensure that staff have skills consistent with the Help Desk’s scope of services and operating procedures.

PaCE-SD has requested that at least one training session be delivered through an in-person workshop; however, if travel restrictions due to the COVID-19 pandemic persists, the workshop will also be delivered online (remotely). The remainder of training shall be delivered through online workshops and/or course modules targeting Help Desk staff. These webinars will provide the opportunity to address more technical aspects of environmental and social safeguards, gender integration, risk management procedures, and other topics. Webinars will also provide the opportunity for Help Desk staff to ask questions and receive targeted guidance on technical topics, and they will be recorded for future use.

The Consultant will also use this training delivery exercise to gather feedback on and refine the draft deliverables listed under activity 4.1 above. This will assist with on-boarding new staff, ensuring that guidelines are tailored to the PaCE-SD’s and PIC’s context, and with the subsequent smooth launch of the Help Desk facility.

Finally, during this period the Consultant will also work with PaCE-SD to help identify auxiliary experts (a roster) from the USP community that can provide additional technical expertise for specific tasks on an as-needed basis.

4.3 Support launch of Help Desk

Following the completion of the preceding activities, the Consultant will participate in the official launch of the Help Desk. Led by PaCE-SD, the Consultant is expected to participate in an expert panel during the launch and provide ad-hoc technical inputs into related communications materials.

5.0 Inputs to be provided by beneficiary

During the delivery of this technical assistance mandate, the USP’s PaCE-SD will facilitate project delivery by providing the following support:

- Assistance with identifying and communicating with relevant points of contact in eligible PICs;
- Identification of PaCE-SD staff that will support and participate in the Help Desk’s functioning;
- Assistance in coordinating with USP’s administration as appropriate;
- Logistical and technical support for training seminars;
- Hosting web meetings and ensuring participation; and,
- Additional support needs as identified during the implementation of the TA.

6.0 COVID-19-related travel restrictions

CTIF anticipates that COVID-19-related restrictions on international travel will remain in effect throughout the duration of this mandate’s procurement and delivery. In this context, bidders are expected to propose an approach and methodology in which any in-person activities would be carried out by locally-based team members, where applicable. Should any in-person activities be proposed, bidders are expected to ensure that any staff working or traveling domestically or regionally will apply local COVID-19 health and safety guidelines. USP notes that its staff are now familiar with the “new normal” of working online and using collaborative online platforms.

7.0 Consultant Profile / Expertise Required

The Consultant best suited to delivering this CTIF mandate will be able to demonstrate the following professional experience and capabilities both corporately and within their proposed team:

- At least 10 years of corporate experience in the fields of climate change policy, mitigation, adaptation or finance;
- Strong track record of applying institutional capacity building expertise to design, expand or strengthen organisations, particularly those with a mandate to provide training to external parties;

- Demonstrated ability to secure financing from bilateral or multilateral donor or financial institutions for projects focused on climate change mitigation or adaptation;
- Senior-level expertise in gender equality and social inclusion; monitoring and evaluation; human resource management; communications; and, organisational capacity building.
- Significant experience working on climate change/adaptation projects/programs in Pacific Island or other small island developing states;
- Recent experience delivering engaging remote/virtual stakeholder workshops and meetings using a variety of engaging tools and techniques;
- Strong in-house capabilities to prepare professional reports, guidance materials and presentations in English for a variety of senior-level public sector and/or academic stakeholders.

8.0 Location and Proposed Timeframe

- **Anticipated start date:** November 2, 2020
- **Duration of assignment:** 12 months
- **Location of assignment:** Consultant's Home Office (remote); Suva, Fiji (if applicable)

9.0 Deliverables

No.	Deliverable	Deadline
1	<p>Inception Report including the following content:</p> <p>a. An updated detailed workplan, work schedule and budget for the delivery of the TA mandate; and,</p> <p>b. A completed CTIF mandate-level Performance Measurement Framework template (see Annex 1), including baseline data and targets against CTIF's mandate-level performance indicators.</p> <p>This workplan and schedule must be designed in close collaboration with PaCE-SD counterparts, and the report must be approved by CTIF and PaCE-SD for the Consultant to proceed with implementation.</p>	Within 4 weeks of contract signature
2	<p>Monthly Progress Reports: A brief (< 1 page) report documenting progress achieved over the past month and status of key deliverables. Format to align with template provided in CTIF TA Handbook.</p>	3 days before end of each month
3	<p>Mid-Term Progress Report: A concise narrative report describing a) activities completed versus the initial work plan, baseline indicators and targets; and, b) any required variations to the project's work plan through to its completion, and associated rationale.</p>	6 months after contract signature.
4	<p>Framework for the Establishment of PaCE-SD's Climate Finance Help Desk: This deliverable will encompass the content described and listed under activity 4.1 above.</p>	Within 9 months of contract signature
5	<p>Workshop and Training for USP/PaCE-SD staff to provide Help Desk Services: This deliverable will entail the delivery of all planned workshop(s) and training activities described under activity 4.2 above and defined in further detail in the Consultant's Inception Report.</p>	Within 11 months of contract signature

<p>6</p>	<p>Final Narrative Report on Mandate: The report shall: describe activities delivered and results achieved (versus initial expected targets and baseline); note lessons learned of relevance to future CTIF projects; provide recommendations, if any, for potential future follow-up TA support; document expenses incurred by the Consultant in carrying out this mandate; document officials trained/participating in the study's activities (name, gender, job title, institutional affiliation); and, include a one-page Story of Change to illustrate the change that has happened, or change that is occurring, as a result of this mandate against the Immediate Outcome noted in section 3.0 above (see guidelines in Annex 2).</p>	<p>Contract completion date</p>
----------	--	---------------------------------

Annex 2: Project Profile Template (to be used to evaluate experience)

Assignment name:		Country:
Location within Country:		Professional Staff Provided (names/titles):
Name and address of Client:		Duration of Assignment (months):
Start date (Month/Year):	Completion date (Month/Year):	Approx. Value of Services (CAD):
Name of Associated Consultants, if any:		No. of Months of Professional Staff Provided by Associated Consultants:
Narrative Description of the Project:		
Description of Actual Services Provided by the Bidding Organization:		

Assignments eligible for inclusion in a potential supplier's bid must have been active within **five calendar years** of the bid submission deadline for this CTIF mandate.

Annex 3: CV Format

Position		
Name and Citizenship		
Education		
Present Employer and Position: <i>if applicable</i>		
Length of Service with Current Employer and Status		
Pertinent Experience: <i>A summary of experience related to the rated requirements</i>		
Employment History: <i>A history of employment and assignments in reverse chronological order</i>		
Publications <i>(if applicable; limit to last 5 years)</i>		
References: <i>name, title, phone and email</i>		

Annex 4: Budget Template (tentative)

Mandate/Project Title:				
Beneficiary Name:				
Bidder name:				
Budget Line	Description/Unit	Rate per day (CAD)	Total LOE (day)	Total budget cost (CAD)
Fees to Consultants				
First name, Last name	Position title			-
				-
				-
Sub-Total - 1. Fees to Consultants				-
International Travel Costs		Rate per unit	Total (units)	Total budget cost (CAD)
Airfare (regional)				-
Airfare (international)				-
Perdiems (country)				-
Perdiems (Canada)				-
Accommodation (country)				-
Accommodation (country)				-
Transportation				-
Transportation (airport transfer)				-
Visa				-
Visa	Visa (Canada)			-
Health insurance	per trainee (Canada)			-
Meeting costs	Room & equipment rental			-
Sub-Total travel costs				-
Training Costs		Rate per unit	Total (units)	Total budget cost (CAD)
Training material customization (information resources, stakeholder meeting, printing, production, communication costs)				-
Rent of facilities (Canada)	per day			-
Rent of facilities (country)	per day			-
Meals (Canada)	per person per meal			-
Meals (country)	per day			-
Interpretation	per day			-
Translation	lump sum			-
Stationery	per participant			-
Domestic travel of local consultant	per ticket			-
Accommodation in country	per night			-
Sub-Total Training Costs				-
HST or other applicable taxes				
Total Proposal Budget				-

Annex 5: Workplan

Activity:			
Objective:			
Target Group:			
Location:			
Measures for accomplishing the objective		Data sources to measures the objective	
A.		A.	
B.		B.	
C.		C.	
D.		D.	
Action	Expected Deliverables	Responsibility	Completion Date

Objective: statement(s) describing the results to be achieved and the manner in which these results will be achieved. Objectives should be SMART, that is, Specific, Measurable, Achievable, Realistic, and Time-phased. For example: To meet the HR Ministerial objective of training 100 people in yearly orders, fifty public officers will be trained in the first quarter, and then another fifty in the third quarter.

Target Group: Define clearly an institutions/community groups/etc. which will involve in the Activity

Location: is where the activity will be implemented.

Measures for accomplishing objectives: measures that are quantifiable criteria that describe whether or not the objective was accomplished. Measures might include target numbers (e.g., 100 public officers trained), or quantifiable changes (public officers reporting increased in formulating a policy relevant to economic growth after attending the training), or completion of an activity.

Data sources to measure the objective: sources may include rosters, logs, agendas, surveys, observations, interviews, or focus groups, profiles, and other data. Data sources are used to assess whether an objective has been achieved. The data sources should be kept, however, and should be available on the request of CTIF project officer during site visits/monitoring visits. Data sources should be summarized to report complete, partial, or unmet objectives in progress.

Annex 6: Rate Justification Form

Date:

Expert's name:

Client, Contract # and Date signed	Dates of assignment	Client Contact Name	Contact Phone #	Contract Duration (Days)	Daily rate	Hours worked/per daily rate	Nature of Services

Organization's Name and Signature

Annex 7. CTIF Mandate-level Performance Measurement Framework – 043-USP-Fiji

Mandate Title	Establishing a Pacific Regional Readiness Coordination Unit under the Green Climate Fund	No.	CTIF 043
Country/Region	Fiji (regional)	Budget (CAD)	TBC
Consultant	<i>TBD</i>	Start - End date:	11/2020-10/2021
Beneficiary organization (s)	Pacific Centre for the Environment and Sustainable Development (PaCE-SD) - University of the South Pacific	CTIF Immediate Outcome #:	1220
CTIF Ultimate Outcome Indicator(s)	1000.2	CTIF Intermediate Outcome Indicator(s):	1200.2
Mandate Summary:	Support the development of a permanent Climate Finance HelpDesk facility based out of the Pacific Centre for the Environment and Sustainable Development at the University of the South Pacific. Through the HelpDesk, Pacific island countries will be able to access technical assistance needed to access financing from international sources that will assist them in implementing their climate change mitigation and adaptation projects and actions.		

CTIF Ultimate Outcome: More inclusive, sustainable and poverty-reducing trade and investment in eligible Asia-Pacific countries

	Outcome Statement	Indicators from PMF	Mandate Baseline	Mandate Target
CTIF Intermediate Outcome 1200	Increased access to markets and finance by Asia-Pacific-based SMEs and CSOs, particularly those led by women.	1200.2 Average # of sources of financing reported by Asia-Pacific SMEs and CSOs (women-led/ male-led)	Women-led: TBC Male-led: TBC	Women-led: TBC Male-led: TBC
CTIF Immediate Outcome 1220	Increased capacity of CSOs & PSOs to support their constituencies in areas such as business growth, women's economic empowerment,	1220.1 # of CSOs and PSOs reporting confidence in internal processes and tools to support their constituencies in areas such as business growth, women's economic empowerment, market access to finance, and/or, responsible business conduct	0	1

	market access, access to finance, and responsible business conduct.	1220.2 # of CSOs and PSOs reporting existence of appropriate knowledge and skills among staff , particularly female staff, to support their constituencies in areas such as business growth, women's economic empowerment, market access to finance, and/or, responsible business conduct	0	1
CTIF Output 1221	Output Statement	Indicators from PMF	Mandate Baseline	Mandate Target
	TA provided to CSOs & PSOs to support their constituencies in areas such as business growth, women's economic empowerment, market access, financing, and responsible business conduct.	1221.1 # of CTIF mandates delivered to CSOs & PSOs to support their constituents with business growth, women's economic empowerment, market access, financing, or responsible business conduct.	0	1
		1221.2 # of CSOs & PSOs provided with financial and/or business development services through CTIF mandates.	0	1
		1221.3 Perceived utility of CTIF TA to CSOs/PSOs in supporting their constituents with business growth, women's economic empowerment, market access, financing, and responsible business conduct as reported by CSOs and PSOs	n/a	5/6
Task 1	Framework and Tools for the Establishment of a Climate Finance Helpdesk at PaCE-SD			
Task 2	Workshop and Training for USP/PaCE-SD staff to provide HelpDesk Services			
Task 3	Support launch of Climate Finance HelpDesk			