



Request for Proposals

Preparation of an Ecosystem Profile for the Guinean Forests of West Africa Biodiversity Hotspot

Opening date: 12 February 2024

Closing date: 25 March 2024

Location: cepf@cepf.net (CEPF, 2011 Crystal Drive, Suite 600, Crystal City VA 22202, USA)

1. Invitation

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement, Conservation International, the European Union, the Global Environment Facility, the Government of Japan, and the World Bank. CEPF is a global program that provides grants to civil society to safeguard the world's biodiversity hotspots.

The CEPF Secretariat requires an organization to lead the preparation of an ecosystem profile – defined in the ensuing document – for the Guinean Forests of West Africa (GFWA) Biodiversity Hotspot. Qualified organizations or consortia are invited to submit a proposal by the closing date listed above, in compliance with this Request for Proposals (RfP) and the scope of work described herein.

The result of this request for proposals will be the issuance of a grant between Conservation International, which administers CEPF on behalf of the global donors, and a single lead organization, which in turn, may have subordinate partners if it so proposes.

Proposals must be submitted electronically to cepf@cepf.net by the closing date listed above.

2. Background

CEPF invests in biodiversity hotspots. Investment consists of a design process, resulting in an ecosystem profile, followed by an implementation period of grant making to civil society organizations of at least five years. Since 2001, CEPF has invested in 25 hotspots. In February 2024, the CEPF Donor Council is expected to approve a new investment in the GFWA, allowing for an update of the existing [ecosystem profile of 2015](#) and leading to a grant program of between US\$4 million and US\$9 million running from at least January 2025 to December 2029.

The hotspot extends across the southern part of West Africa and into Central Africa north of the Congo Wilderness Area. The hotspot covers 621,705 km² and can be divided into two subregions. The first subregion, referred to as the "Upper Guinean Forests," stretches from Guinea in the west, through Sierra Leone, Liberia, Côte d'Ivoire, Ghana, Togo and, marginally, into Benin. The second subregion, the

“Lower Guinean Forests,” covers much of southern Nigeria, extends into southwestern Cameroon and includes São Tomé and Príncipe and the offshore islands of Equatorial Guinea.

The Guinean Forests support impressive levels of biodiversity, having high levels of species richness and endemism. Approximately 9,000 species of vascular plant are believed to occur in the hotspot, including 1,800 endemic species. The hotspot also supports an exceptional diversity of other terrestrial species. There are 416 mammal species (representing nearly a quarter of the mammals native to continental Africa), 917 bird, 107 reptile and 269 amphibian species within the hotspot boundary, of which 65 mammal, 48 bird, 20 reptile and 118 amphibian species are thought to be endemic to the hotspot. Additionally, the hotspot is among the world’s top priorities for primate conservation, with five Critically Endangered and 21 Endangered species.

As detailed on the [CEPF website](#), CEPF has been active in this region since 2001, with a full investment running from 2001-2006 (referred to as GFWA I), followed by a series of “consolidation” grants from 2009-2012, then the most recent investment program from 2016-2021 (referred to as GFWA II). GFWA II was based on an ecosystem profile (in [English](#) and [French](#)) that included an extensive analysis of key biodiversity areas (KBAs). The investment ended in 2022 with a detailed [assessment of results](#), a [Long-Term Vision](#), and an [independent evaluation](#) of the regional implementation team, which together provide guidance on future investments.

Beginning in June 2024, CEPF intends for a team to use the 2015 profile, the 2022 final assessment, and 2022 long-term vision as the basis for the preparation of an **updated ecosystem profile**, which will serve as a guide to future grant making to civil society groups working in the region. This will require review of existing strategies and a rapid consultation process to define biological priorities for conservation action, documenting the context in which conservation takes place, and identifying priority actions for strengthening and engaging civil society in biodiversity conservation, as seen by stakeholders in the region. The consultation process will recognize that similar efforts have been completed in the recent past and will be respectful of existing strategies to capture, either directly or indirectly, the perspectives, priorities, and capacity development needs of local stakeholders, such as grassroots NGOs and community groups, as well as of government, private sector, donor, and civil society stakeholders.

The results of this process will be presented in a document titled the *Ecosystem Profile for the Guinean Forests of West Africa Biodiversity Hotspot: 2024 Update*, which provides a situational analysis, based upon a review of biodiversity priorities, threats, policy environment, civil society context and current conservation investment by other funders, and presents an investment strategy developed jointly with stakeholders. In this context, the ecosystem profile is both a **document** and a **process**. The organization that leads this effort will deliver the final document but must produce it in a way that ensures stakeholder consultation and agreement. A good ecosystem profile will begin building partnerships and momentum well before CEPF makes its first grants in the region.

In short, the ecosystem profile will be a snapshot of the hotspot in 2024 that describes the state of, and threats to, biodiversity and the capacity of civil society to engage as a partner in conservation. The ecosystem profile:

1. Secures broad-based scientific agreement on biological priorities for conservation.
2. Describes the main threats to biodiversity.
3. Provides an overview of civil society as a partner in conservation.

4. Defines CEPF's investment strategy in the hotspot.

CEPF's donors expect to receive the updated ecosystem profile for review by December 2024. Upon approving the profile, the Donor Council will also approve a total amount to invest in the region and an investment period. Subject to the availability of funding, grant-making will begin thereafter.

2.1. Conservation Outcomes

Biological priorities for CEPF investment are defined in terms of conservation outcomes. Conservation outcomes are the entire set of conservation targets in a hotspot that need to be achieved to prevent species extinctions and biodiversity loss. The CEPF investment strategy will be based upon these outcomes, first to ensure that CEPF investments are directed at the conservation of global biodiversity, and second to enable measurement of the success of conservation investments.

Conservation outcomes exist at three scales, namely: (1) globally threatened species; (2) the sites that sustain them (Key Biodiversity Areas or KBAs); and (3) the corridors necessary to maintain the ecological and evolutionary processes upon which those sites depend. In defining outcomes at the species, site, and corridor scales, CEPF identifies targets that are quantitative, justifiable, and repeatable. CEPF will not try to achieve all these targets through its funding, but the investment strategy will address a subset of them: priority species, sites, and corridors.

For the purposes of the GFWA III Profile, conservation outcomes will be defined based on available data only; no new outcomes will be identified. The profiling team will be provided with datasets on KBAs and conservation corridors, to incorporate into the ecosystem profile, and be expected to generate lists of globally threatened species from the [IUCN Red List](#). Based on these available data, the profiling team will be expected to facilitate a stakeholder consultation process that results in the selection of priority species, sites, and corridors for CEPF investment, based on the transparent application of a set of criteria.

2.2. Focus of the Profile

The ecosystem profile is built around a biodiversity hotspot, which, in this case, covers all or parts of 11 countries. The ecosystem profile should address the entire hotspot, including terrestrial, freshwater and marine realms. That being said, limited time, money, availability of data and other factors will prevent the profile document from addressing every subject with equal depth for each country and will prevent the team from engaging stakeholders equally in each country. Given the uneven distribution among countries of opportunities to engage civil society in biodiversity conservation, CEPF expects applicants to propose a strategy of engagement and analysis that varies by country, ranging from in-person and in-depth to virtual consultation, remote engagement, or desk studies.

Further, while the profile considers the political and biological entirety of the hotspot in its analysis, this does not presume the focus of the final investment strategy, the grants that are eventually awarded, or their outcomes.

Applicants should be clear in their proposals how, and to what degree, they will conduct stakeholder consultations in each country.

3. Eligibility and Exclusions

CEPF will accept proposals from any qualified organization, including NGOs, private consulting firms and universities. Government-owned enterprises or institutions are eligible only if they can establish that the enterprise or institution: (i) has a legal personality independent of any government agency or actor; (ii) has the authority to apply for and receive private funds; and (iii) is not able to assert a claim of sovereign immunity.

Organizations may choose to form a consortium for the purposes of submitting a proposal. If a consortium is submitting a proposal in response to this RfP, then one organization must be clearly identified as the lead. The lead organization will have final responsibility for submitting the consolidated proposal, and, if successful, will be responsible for leading implementation, reporting to CEPF, receiving and disbursing funds, and coordinating the other members of the consortium.

The organization, or organizational members of a consortium, that prepares the ecosystem profile will **not** be precluded from bidding on grants during the subsequent implementation phase.

4. Period of Performance

The period of performance is anticipated to be from 1 June 2024 until 28 February 2025.

5. Place of Performance

The place of performance is the regular place of work of the members of the profiling team. Applicants should plan and budget for travel to and within the GFWA Hotspot as required to undertake the necessary stakeholder consultations.

6. Budget

The total budget that CEPF will allocate for this award, inclusive of all taxes, management support costs, or other indirect costs, is US\$200,000 (two hundred thousand United States dollars).

7. Solicitation, Review and Award

The CEPF Secretariat is responsible for the analysis of applications, selection of the top-ranked applicant and negotiation with the top-ranked applicant leading to the award of a grant in accordance with CEPF's grant-making procedures.

8. Supervision by the CEPF Secretariat

The selected profiling team will report to the CEPF Secretariat. The Secretariat will provide direct and ultimate guidance to the team.

9. Scope of Work

9.1. Ecosystem Profile – Detailed Document

The ecosystem profile will be drafted in English and adhere to the structure below. During the drafting process, the profiling team will prepare drafts and summaries in French, as well, for appropriate government personnel and stakeholders in each of the countries. The team will prepare the final document in professionally edited English for the CEPF Donor Council, and upon approval of that document, will prepare a professionally edited French translation.

Chapter	Approximate Page Length*
Executive Summary	3
Chapter 1. Introduction	2
Chapter 2. Background	4
Chapter 3. Biological Importance of the Hotspot	6
Chapter 4. Conservation Outcomes for the Hotspot	15
Chapter 5. Threats to Biodiversity in the Hotspot	5
Chapter 6. Socioeconomic Context of the Hotspot	6
Chapter 7. Policy Context of the Hotspot	6
Chapter 8. Civil Society Context of the Hotspot	15
Chapter 9. Climate Change Assessment	8
Chapter 10. Assessment of Current Conservation Investment	15
Chapter 11. CEPF Niche for Investment	1
Chapter 12. CEPF Investment Strategy and Programmatic Focus (including Logical Framework table)	25
Chapter 13. Logical Framework	6
Chapter 14. Sustainability	3
Total	120
References	
Appendices	

* Page count does not include tables or figures.

The ecosystem profile is an original document. It is composed essentially of two sections. The first section consists of Chapters 1-10, which provide a situational analysis for the hotspot as a whole. These chapters form the basis for the prioritization and strategy which are presented in the second section, consisting of Chapters 11-14. The second section focuses only on those species, sites and corridors that are prioritized for CEPF investment.

Chapter 1. Introduction. This chapter describes the conservation imperative for the hotspot, introduces CEPF as a global program and gives a general overview of the hotspot. It describes the approach, conservation outcomes tool and strategy development.

The chapter should include the following, at a minimum, even if this information is from past CEPF documents or appropriately credited sources:

Map: This chapter will include a map of the hotspot.

Chapter 2. Background. This chapter describes the process behind the development of the profile, the stakeholder consultations and the partners involved. It should also briefly discuss the history of CEPF in the region per Section 2 of this RfP, above.

The chapter should include the following, at a minimum:

Table: Dates and participant numbers for all stakeholder workshops.

Chapter 3. Biological Importance of the Hotspot. This chapter describes the geography, climate and biological history of the hotspot, with a consideration of the terrestrial, freshwater and marine realms. The chapter will provide a summary of species diversity, levels of endemism and global threat status among major taxonomic groups in the hotspot. The focus will be on the taxonomic groups for which data on global threat status are available. This chapter also describes major ecosystem services, including freshwater flows, support to food production, support to cultural services, carbon sequestration and disaster mitigation, among others. Notwithstanding the above guidance on content, this chapter will make extensive reference to existing data sources and documentation. The chapter will provide context and electronic links and should be summary in nature.

The chapter should include the following, at a minimum, even if this information is from past CEPF documents or appropriately credited sources:

Table: Species diversity, endemism, and global threat status in the hotspot, by taxonomic group.
Table: Principal ecosystem services.

Chapter 4. Conservation Outcomes for the Hotspot. This chapter describes and summarizes the conservation outcomes for the hotspot. Conservation outcomes represent the quantifiable set of species (i.e., globally threatened species), sites (i.e., KBAs), and higher-scale spatial units (i.e., corridors, landscapes) that are indispensable to conserving the global biodiversity values of the hotspot.

1. Species outcomes will be based on a comprehensive list of globally threatened species occurring in the hotspot, corresponding to categories critically endangered (CR), endangered (EN) and vulnerable (VU) on the current IUCN Red List.
2. Site outcomes will be based on a comprehensive list, with accompanying maps, of KBAs for the hotspot. The profiling team will be provided with up-to-date lists and GIS layers on KBAs in the hotspot, based on the World Database of KBAs. The team will not be responsible for updating this list.
3. Corridor outcomes are higher-scale spatial units necessary to maintain ecological and evolutionary processes at the landscape scale. The profiling team will be provided with a list and GIS layer of conservation corridors in the hotspot, based on the previous exercise. The team will have the option of revising the list and/or boundaries of conservation corridors, in consultation with stakeholders, if deemed necessary to reflect current knowledge.

Notwithstanding the above guidance on content, this chapter will make extensive reference to existing data sources and documentation.

The chapter should include the following, at a minimum, even if this information is from past CEPF documents or appropriately credited sources:

Map: KBAs in the hotspot (separate map for each country, plus overall map).
Map: Conservation corridors in the hotspot.

Table: Summary data on number of globally threatened species in the hotspot and by country.

Table: Summary information on KBAs in the hotspot and by country.

Table: Summary information on conservation corridors in the hotspot (name, country, size).

Chapter 5. Threats to Biodiversity in the Hotspot. This chapter will describe and prioritize threats to biodiversity in the hotspot and explore their root causes. Stakeholder input is expected for this chapter in relation to threat prioritization addressed by the CEPF investment strategy. The chapter should make extensive reference to existing studies and analyses of direct threats and root causes, while focusing on those issues that could conceivably be addressed by CEPF-funded projects.

Chapter 6. Socioeconomic Context of the Hotspot. This chapter provides an overview of the socioeconomic situation of the hotspot, an analysis of how this affects conservation outcomes, and how it could influence the strategic directions for CEPF actions. The chapter should make extensive reference to existing studies and analyses. The chapter should highlight the most relevant matters in each country, which could include any, *but not all*, of the following: population, demographics, migration, distribution trends (e.g., urban versus rural, state to state), poverty and welfare distribution, economic activities as they relate to natural resource use (e.g., agriculture, energy, fisheries, mining, forestry, tourism), ethnic and indigenous distinctions, linguistic/social/religious distinctions if they have relevance to civil society engagement and/or conservation, and youth. The emphasis should be on analysis of the implications for the socio-economic context for CEPF investment in the hotspot and not on merely describing the current situation.

There must be a distinct section on gender issues in each country as they inform potential grant-funded projects.

Chapter 7. Policy Context of the Hotspot. This chapter briefly reviews the political situation in each country, summarizes economic development policies and strategies, and assesses how the policy context affects biodiversity conservation and could influence the CEPF investment strategy. That being said and noting the recommended page length of the chapter, the text should make extensive reference to existing studies and analyses. Again, the focus of the chapter should be on analysis – not description – of the policy context and could discuss any, *but not all*, of the following, for each relevant country:

1. The legal status of protected areas and corridors: who owns them, or which public agencies are responsible for their management.
2. Overview of trends in governance: decentralization; political conflicts; and security issues.
3. Overview of near-term policy initiatives affecting resource management in KBAs and corridors.
4. Overview of the institutional and policy framework for conservation, including description of the mandates and capacity of principal agencies and authorities, National Biodiversity Strategies and Action Plans, major national laws, and international conventions.
5. Overview on other policies and regulations related to the financing of conservation (e.g., policies that allow, or prevent, taxes, licensing, or revenue streams for biodiversity conservation).

Chapter 8. Civil Society Context of the Hotspot. For the purposes of this chapter, CEPF defines civil society as non-state actors, including *inter alia*, local, national and international NGOs; scientific, research and academic institutions (including universities); professional organizations; producer and sales associations; religious organizations; media; social welfare agencies; Indigenous People's

organizations; and private companies. As civil society organizations are the recipients of CEPF support, this chapter informs the CEPF investment strategy in the following ways:

1. Which organizations, by name or type, are working on biodiversity conservation, or which organizations *could be* working on conservation, directly or indirectly. This implies looking beyond organizations with a strict conservation mission to economic and social development actors in relevant geographies.
2. Do these groups have the capacity to implement CEPF grants, or do they have limitations in terms of human resources, financial resources, management systems, strategic planning, or project delivery, and will these limitations in any one country or region prevent the achievement of conservation outcomes?
3. Describe existing civil society networks.
4. Describe existing efforts to strengthen civil society organizations, as a whole, in each country.
5. Describe the operating environment for civil society organizations in terms of legal framework, political space, funding availability, ability to register or convene a group, receive funding, report on income, or manage sites; and describe variations of these within sub-regions of the hotspot.

Chapter 9. Climate Change Assessment. This chapter should rely on reports from the Intergovernmental Panel on Climate Change and other relevant documents to place conservation outcomes in the context of climate change. Reference should be made to other sources that provide an overview of the hotspot's climatic history, how this has shaped the biota, and the projected impacts of climate change on human populations and biodiversity, including the potential impacts of the human response to climate change on natural areas. Reference should also be made to documents providing recommendations for strengthening policies and approaches for adaptation and mitigation.

Consultations and analysis should lead to a description of the adequacy of protected area systems, forest management, and water management to promote resiliency and should focus on those mitigation and adaptation opportunities most appropriately addressed by CEPF grants.

Chapter 10. Assessment of Current Conservation Investment. To define the best use of CEPF funds, this chapter describes other investments working toward biodiversity conservation, whether these investments be public or private, foreign, or domestic. Focus should be given to any major actor informing the CEPF investment niche strategy defined in Chapter 11 and Chapter 12. Focus should also be on those donors making funds available to civil society, including the national environmental funds and the UNDP GEF Small Grants Programme in some of the countries. While lists of relevant donor projects could be included in the Appendices, the purpose of the chapter is to not simply describe the work taking place, but the conclusions to be drawn, including locations of funding gaps, opportunities for leverage, and places where existing funding might be sufficient. The chapter should discuss:

1. Where and why existing activities and investments are deemed to be insufficient or ineffective.
2. The effectiveness of existing domestic public revenue streams (e.g., taxes, licensing for resource use).
3. The effectiveness of existing sustainable financing mechanisms (e.g., trust funds) or opportunities to support such mechanisms.
4. Where funding may exist but is limited to public sector agencies as opposed to civil society.

5. Where funding may exist but is coming from sources not directly linked to conservation (e.g., infrastructure projects that include funds to mitigate environmental impacts; immigration management projects with enforcement components that change where people settle).

Chapter 11. CEPF Niche for Investment. Based on the preceding description of the conservation outcomes and investment context, this chapter identifies how CEPF investment will complement (and build upon) investments by other funders discussed in Chapter 10 and in relation to the needs and opportunities described in Chapters 4-9. The niche presages the Investment Strategy (Chapter 12) by implying the types of activities for which grant funding will be provided, the types of organizations to receive this funding, and the geographic focus of this work. The niche also accounts for the viability of granting in any single country, region, or geography (e.g., terrestrial or marine).

Chapter 12. CEPF Investment Niche, Strategy and Programmatic Focus. This chapter defines CEPF grantmaking for five years. It is justified by the preceding chapters, should be built on past CEPF work, and should reflect the input of stakeholders. It will have the following structure.

1. Priority species outcomes, with a discussion and rationale for prioritization.
2. Priority site outcomes, with a discussion and rationale for prioritization.
3. Priority corridor outcomes, with a discussion and rationale for prioritization.
4. Strategic Directions and subordinate Investment Priorities, with a discussion of eligible types of projects under each of these themes.

The chapter should include the following, at a minimum:

Table: Priority species for CEPF investment [if relevant to the CEPF niche for investment].

Table: Priority sites for CEPF investment.

Table: Priority corridors for CEPF investment [if relevant to the CEPF niche for investment].

Maps: Priority KBAs and corridors in the hotspot [one map per country].

Table: CEPF strategic directions and investment priorities for the hotspot.

Chapter 13. Logical Framework. The Logical Framework is essentially a table, directly parallel to the Strategic Directions and Investment Priorities, with a realistic set of outcomes in relation to amount of money allocated for grant making. It should be phrased in relation to the needs of the region, the CEPF [Global Monitoring Framework](#), [Global Biodiversity Framework](#) targets, and United Nations [Sustainable Development Goals](#). (The CEPF Secretariat will work closely with the profiling team on the structure of the logical framework and any quantifiable targets.)

Chapter 14. Sustainability. This chapter describes how the proposed strategic directions will result in sustainable conservation outcomes. The chapter may consider any relevant angle that informs long-term goals, including: how investments will lead to greater engagement of civil society in conservation; how investments build the operational capacity of civil society; how investments change the availability of funding for civil society; how investments improve the sustainability of other donor funded projects; or how investments create larger networks that catalyze action.

References. Include complete references for all literature cited in the profile.

Appendices. If this information is not directly incorporated in tabular format into the main document in full, suggested appendices include:

1. All species outcomes (i.e., globally threatened species) in the hotspot.
2. All site outcomes (i.e., KBAs) in the hotspot, number of hectares, protection status, and trigger species (i.e., the species that qualify a site as a KBA).
3. All conservation corridors in the hotspot.
4. Biological prioritizations (i.e., scoring or ranking) of species, sites, and corridors.
5. Ecosystem services and their contribution to economic development in the hotspot.
6. List of relevant civil society groups in the hotspot.
7. Major current external and internal investments in conservation in the hotspot.
8. Baseline list of policies and laws requiring enactment or improvement as evidence of change.
9. Baseline list of financing mechanisms in existing – or identified gaps – with assessment of available US dollars for funding.
10. Baseline list of existing networks or partnerships – or identified gaps – requiring improvement as evidence of change.

9.2. Ecosystem Profile – Technical Summary Document

The Technical Summary will be 30 pages in length, inclusive of maps and tables, in English, with a separate French translation. It will be drafted and presented, in English, concurrent with the first formal draft detailed profile submitted to CEPF. It will be revised when presented to the CEPF Donor Council and revised again as a final version in parallel to the final profile. The final version must then be translated into French. Whereas the full ecosystem profile is intended for applicants and as a reference document, the technical summary – particularly, the French version – is intended for donors and host-country decision-makers.

9.3. Ecosystem Profiling Process

CEPF intends that the drafting of the ecosystem profile document be much more than a desk study. Rather, it is a process of engagement and consensus-building among host-country governments, donors, and civil society actors with the result being a document that has broad-based support. To accomplish this, the profiling team is expected to propose and complete the following:

1. Participate in 1-day briefing/launch meeting with CEPF Secretariat personnel, either in person in Arlington, Virginia or virtually via video conference.
2. Convene regular management meetings (virtual) of principal authors and contributors to the document and process.
3. Determine and then convene, either in person or virtually, an appropriate senior advisory body or set of advisors. Ideally, this includes one or more [GEF Operational Focal Points](#) from the hotspot countries, leading members of international and local civil society, the private sector, and selected donor representatives.
4. Organize and hold launch events or meetings with key government, private sector, donor, and civil society stakeholders to describe the timeline and purpose of the overall exercise.
5. Organize and hold a series of stakeholder consultation meetings in various locations within the hotspot or around different themes, based on expert input papers or draft chapters of the profile, that seek local inputs into the CEPF investment strategy and that build a common vision

for conservation in the hotspot. (Proposals should specify the number, locations and themes of planned meetings, the approximate dates and expected participants).

6. Organize and hold a final consultation meeting with key senior stakeholders that presents the draft biological priorities, Strategic Directions, and Investment Priorities.
7. Under the guidance of the CEPF Secretariat, prepare a full draft of the ecosystem profile for review by a technical Working Group made up of representatives of CEPF's global donors.
8. Present the draft ecosystem profile at a virtual meeting of the CEPF Working Group.
9. With the CEPF Secretariat, revise the draft to respond to comments from the Working Group.

Further to Section 2, CEPF recognizes that, with limited funds for this exercise, and given the challenges of government engagement or access to civil society in certain parts of the hotspot, the methods and depth of consultation will vary by country. The profiling team should be prepared to use phone, electronic mail or virtual methods to engage with some stakeholders.

The profiling team must consider that stakeholders extend beyond traditional conservation actors (that is, environmental NGOs, research institutions and universities, government agency protected area authorities, and donor representatives with an individual conservation remit) to include the major development, private sector and agro-industrial actors in the region. Absence of appropriate consultation with the variety of economic development actors influencing conservation in the hotspot will be considered non-performance by the team.

9.4. Timeframe, Milestones, Deliverables, and Payment Schedule (to be finalized upon grant award)

This timeframe below, up until the submission of the first draft of the ecosystem profile (Deliverable 10 in the table below), is illustrative and should guide applicants. After the submission of the first draft, applicants should view the timing and actions as static and defined by the formal review and revision process required by the CEPF Working Group and Donor Council. The timeframe, milestones, and deliverables will become a formal part of the grant agreement with the selected applicants.

Payment will occur upon inception, quarterly thereafter, and upon completion, subject to the submission of deliverables and acceptance by CEPF.

After submission and scoring of proposals, CEPF will ask the top-ranked applicant to propose an indicative payment schedule, per the below, that reflects the anticipated cash demands implied in their budgets. Actual quarterly payments will be made based on an acceptable cash flow projection indicating cash on-hand and anticipated expenses for the upcoming quarter. Only expenses for actual, reasonable, and documented costs as authorized in the approved budget will be allowed.

Invoice	Date	Deliverable	Amount (USD)
1	1-Jun-24	No deliverable / agreement signature	\$tbd
	5-Jun-24	1. Electronic announcement of the ecosystem profile process 2. List of key participant stakeholders and draft stakeholder analysis 3. Draft schedule of planned stakeholder workshops	
	3-Jul-24	4. Final schedule and agenda for all stakeholder workshops	
	15-Jul-24	5. Draft list of globally threatened species (KBA trigger species), KBAs, and corridors 6. List of members of Senior Advisory Group or (presentation of advisory scheme)	

Invoice	Date	Deliverable	Amount (USD)
2	15-Jul-24	Invoice for period of June 2024	\$tbd
	15-Aug-24	7. Draft chapter on conservation outcomes	
	1-Oct-24	8. Draft strategic directions and investment priorities 9. Draft logical framework and numeric targets	
3	15-Oct-24	Invoice for period of July-September 2024	\$tbd
	18-Nov-24	10. Full draft of ecosystem profile per SOW Item 9.1, in English (i.e., "Draft 1, submitted for CEPF Secretariat review")	
	30-Nov-24	11. Summary proceedings of all stakeholder and Senior Advisory workshops (i.e., date, location, agenda, final participant list, photos, and 500-word summary or bulleted list of stakeholder feedback on major outputs)	
	20-Dec-24	12. Revised ecosystem profile per Secretariat comments, in English (i.e., "Draft 2, submitted for CEPF Technical Working Group review")	
	20-Dec-24	13. 30-page technical summary, in English 14. PowerPoint presentation to CEPF Technical Working Group in Washington, DC	
4	15-Jan-25	Invoice for period of October-December 2024	\$tbd
	31-Jan-25	15. Revised ecosystem profile per comments at Working Group presentation, in English (i.e., "Draft 3, submitted for CEPF Donor Council review")	
	14-Feb-25	16. Final contact list of all individuals consulted for the ecosystem profile (i.e., name, position, organization, telephone, electronic mail, geographic location) 17. GIS layer of conservation corridors 18. Species-site matrix (in MS Excel) listing KBA trigger species and other features for each KBA (only if updated by the profiling team)	
	28-Feb-25	19. Final ecosystem profile (English) (in collaboration with the CEPF Secretariat) 20. Final ecosystem profile (French) (in collaboration with the CEPF Secretariat) 21. Final ecosystem profile 30-page summary (English) 22. Final ecosystem profile 30-page summary (French)	
5	31-Mar-25	Invoice for period of January-February 2025	\$tbd
Total			\$200,000

10. Provision of Facilities

CEPF will make available sample ecosystem profiles, sample agendas for stakeholder consultations, and lists of contacts. CEPF will also provide existing KBA data and will identify model or sample chapters from past profiles to guide the writing. The profiling team will otherwise be expected to work from its own premises collect literature independently.

11. Personnel

Writing the ecosystem profile and leading the process requires a team of experts with a broad set of skills. Based on past experience, CEPF advises applicants to provide for the following:

A **Team Leader** with multiple years of experience designing and managing multi-faceted conservation programs, particularly in GFWA; demonstrated ability to lead teams of experts, facilitate stakeholder-driven processes, and coordinate with donors and government counterparts to develop an outcomes-based conservation strategy; and ability to write and synthesize a complex document similar to an ecosystem profile.

An expert in **Conservation Outcomes** who can facilitate the stakeholder consultation process resulting in a prioritized set of conservation outcomes (priority species, sites, and corridors), and an outcomes-based investment strategy.

An expert in **Civil Society Organizations** who can lead or synthesize the analysis of the capacity of potential CEPF partners in the region, with demonstrated knowledge and experience of the roles played by these groups and the constraints they face.

If not captured in the above, **other experts** will provide skills per each of the chapters named in the scope of work for the ecosystem profile.

As noted above, the final ecosystem profile document should be prepared in professional quality English and then translated into French. As such, if the proposed personnel are not otherwise bilingual, applicants should include, by position title if not name, an appropriate allocation for a professional editor and/or translator.

12. Instructions for the Preparation of Proposals

Proposals must be submitted in English.

If a consortium of organizations is submitting a proposal, the proposal should reflect the inputs and capabilities of the entire consortium. After evaluation and prior to grant award, CEPF may require some of the documents detailed below from each consortium member.

Applicants are advised to read this section carefully in conjunction with Section 15 (Evaluation Criteria) to understand the relative weighting CEPF will use in evaluating proposals.

Proposals should be submitted electronically to cepf@cepf.net by the closing date listed on the first page of this Rfp. Files should be submitted in MS Word, MS Excel, PDF or another standard format. The budget file requested below must be submitted in a functioning Excel spreadsheet.

12.1 Cover Letter

Applicants should include a cover letter to their proposals listing all documents submitted. The cover note should clearly list the name of the organizational chief executive, and, if different, the name(s) of all parties with the ability to legally bind the organization and the name(s) of all parties whom CEPF should contact for clarifications and negotiations. The cover note should also provide complete mailing address, street address (if different), electronic mail address(es), and telephone numbers.

12.2 Organizational Capabilities (no page limit)

Provide documentation showing evidence of the ability to complete the tasks described in the scope of work. This should include, at a minimum:

1. Basic organizational information, including: year organization established, total permanent staff globally and in GFWA, and organizational history and mission statement.
2. Relevant experience in the countries of GFWA.
3. Experience managing multi-disciplinary efforts that are based on applied conservation science.
4. Experience facilitating stakeholder consultations.
5. Experience preparing programmatic design documents.

6. Experience conducting science-based priority-setting exercises.
7. Experience working with donors, governments, communities, the private sector, and other stakeholders on conservation and development issues, including building alliances and networks of stakeholder groups to achieve conservation goals.

12.3 Technical Approach (maximum 3 pages)

1. Applicants should demonstrate their understanding of conservation outcomes, as applied to GFWA.
2. Applicants should also demonstrate their understanding of potential stakeholders in the hotspot; that is, both participants in the design process as well as the members of civil society that would make up the bulk of grant recipients during implementation.
3. Applicants should demonstrate their knowledge of work similar to, or that will serve as an input to, the ecosystem profile. There are multiple compendiums and analyses of conservation issues in the overall region and individual countries. The successful applicant will reflect on how it can build on this existing work.
4. Applicants should propose a tentative plan for the stakeholder consultation process, including, to the extent possible, locations of workshops and how these might be arranged geographically, thematically, or by types of participants (e.g., conservation science, civil society, local government, private sector).

12.4 Curricula Vitae of Key Personnel

This work effort will be taking place over a very tight timeframe and a primary basis of selection will be the expert personnel who are immediately available to begin work. Applicants must identify, by name, the team leader and at least two more additional experts who will lead this process. Applicants must provide curricula vitae for these individuals with the proposal. Proposals lacking curricula vitae will be considered non-responsive. Individual team members are expected to have, collectively, extensive experience in GFWA and expertise in applied terrestrial conservation science, civil society strengthening, and the socio-economic and political conditions of the region.

Collectively, the team must demonstrate fluency in spoken and written English and French.

12.5 Workflow and Team Structure Diagrams

Provide as appropriate, workflow diagrams (e.g., Gantt charts), team structure diagrams, or any other visual element better explaining how technical activities will take place, when they will take place, and who will be responsible for leading them.

12.6 Consortium Description

If a consortium of organizations is applying, applicants should explain the contractual arrangements that will be made between the lead applicant and subordinate partners.

12.7 Budget

Please refer to the attached budget template in Excel.

Concurrent with the release of this Rfp, CEPF is providing each of the applicants with a budget template in Excel displaying 13 primary line items: salaries/benefits; professional services; rent and storage; telecommunications; postage and delivery; supplies; furniture and equipment; maintenance; travel; meetings and special events; miscellaneous; management support costs; and sub-grants. Some of these have multiple sub-items. Applicants *must use this template*. If a consortium of organizations is applying, each subordinate organization should have a parallel budget on a separate Worksheet, all of which should feed into the lead applicant's Worksheet, where the costs of each subordinate organization should be shown under the sub-grants line.

As noted above, the final ecosystem profile document should be prepared in professional quality English and French. As such, if the proposed personnel do not otherwise have these capabilities, applicants should include an appropriate budget for a professional editor and/or translator.

The Excel file provided must be functioning and not "locked" in any way. Worksheets should show all calculations, including unit costs, total units, and totals through the life of the activity.

CEPF allows for management support costs up to a maximum of 13 percent of the direct costs. Management support costs must reflect actual shared costs and must be justified with supporting documentation, such as audited financial statements. CEPF does not allow the application of a fee, profit, tax, or any other cost that could not otherwise be accounted for directly.

Provide a brief companion narrative if the budget is not otherwise clear. The companion narrative should explain any individual worksheet cells, budget elements, or assumptions that are not self-evident in the Excel file or otherwise explained in the proposal. (For example, an applicant's approach to stakeholder consultations will make certain assumptions about the number of travelers whose costs are borne by this grant and the location and duration of consultations.)

This Excel file CEPF is providing includes three worksheets. Worksheet 1 is a summary that is based on Worksheet 2. The third Worksheet is a proposed deliverable schedule (i.e., a set of fixed obligations) for the life of the agreement.

13. Financial Questionnaire and Tax Declaration

After submission and scoring of proposals, CEPF will ask the top-ranked applicant to complete the [financial questionnaire](#) linked here. The questionnaire itself requests further documentation about your organization, including financial statements, auditor statements and registration/incorporation certification.

The top-ranked applicant will also be required to submit a United States Internal Revenue Service [W-8BEN-E form](#) related to tax withholding and reporting.

14. Security Screening

The top-ranked applicant will subsequently be required, per United States law, to complete [forms](#) demonstrating compliance with anti-terrorism statutes.

15. Evaluation Criteria

CEPF will make a best value determination of technical proposals in relation to proposed budgets. The least-cost budget will not necessarily be ranked the highest for evaluation purposes.

15.1 Technical Evaluation

CEPF will use the scorecard below for the technical evaluation of proposals. The scorecard shows the questions that reviewers will use and the relative weighting of each category. Applicants should ensure that each of these points is adequately addressed in their proposal.

Proposal Technical Evaluation Scorecard

1	Organizational Experience	Points
1.1	Do the applicant and its partners have relevant experience in conservation science and GIS?	30
1.2	Do the applicant and its partners have relevant experience in analyzing civil society, policy, and socioeconomic conditions in terms of designing a conservation program?	
1.3	Do the applicant and its partners have relevant experience in GFWA?	
1.4	Does the lead organization demonstrate experience managing programs of similar size, scale, and complexity as that of the ecosystem profiling team?	
2	Personnel	Points
2.1	Does the applicant propose a clear and viable personnel plan, including names, resumes, position titles, job descriptions, level of effort, work location, and reporting lines of authority?	50
2.2	Does the applicant submit the name and resume a single, dedicated team leader, and does this person have the appropriate technical skills/experience and appropriate managerial skills/experience?	
2.3	Does the applicant propose, by name and resume, personnel other than the team leader, and do these people have appropriate technical skills/experience and appropriate managerial skills/experience?	
2.4	Do the proposed team members have, individually or collectively, the language skills necessary to operate effectively in the hotspot?	
2.5	Does the applicant propose a plan for recruitment and/or mobilization of “to be determined” personnel, including job descriptions, job qualifications, and curricula vitae of personnel from the applicant’s organization who will perform relevant duties while recruitment is pending?	
3	Proposed Technical Approach	Points
3.1	Does the applicant demonstrate a clear understanding of the KBA methodology and conservation outcomes as these relate to the ecosystem profile for GFWA?	20
3.2	Does the applicant demonstrate a clear understanding of civil society in GFWA and the role it will play in both the production of the ecosystem profile and the eventual recipient of CEPF grants?	
3.3	Does the applicant demonstrate a knowledge of existing work similar to the ecosystem profile, or relevant inputs, and suggest a way to efficiently build upon this?	
3.4	Does the applicant propose a clear plan for engagement of stakeholders at multiple levels, in multiple locations, and across multiple disciplines to both produce the ecosystem profile document and ensure a collaborative process that serves as the foundation for a future grants program?	

15.2 Cost Evaluation

CEPF will consider each cost proposal in relation to the level of quality and output suggested in the technical proposal. Cost proposals will thus be considered in terms of their realism and the items below, but will not be given a numeric score. CEPF will select the applicant which presents the best value for the required product and services.

Proposal Cost Evaluation Scorecard

4	Budget
4.1	Is the budget within the limit named in Section 6?
4.2	Are all costs mathematically justified through the clear presentation of unit costs, total units, and total costs?
4.3	Are all unit costs, total units, and total costs appropriate in relation to the proposed technical and managerial activities?
4.4	Are proposed unit rates in accord with market rates in the region?
4.5	If the applicant claims indirect costs, does it clearly show the base of application and is this distinct from any previously enumerated direct costs; does the applicant provide an explanation of how the indirect cost rate has been determined (e.g., historical averages, audited financial statements, precedent contracts); and does the applicant provide supporting documentation with its financial questionnaire?
4.6	Does the budget relate clearly and directly to the proposal?
4.7	Are the costs budgeted for stakeholder consultations sufficient and realistic?
4.8	Are all macroeconomic assumptions affecting the budget reasonable and justified, such as foreign exchange rates and inflation?

Appendix 1. Criteria for KBA Prioritization for CEPF Investment

1. **Biological priority.** The KBA is ranked as a high relative priority for biological importance, based on the criteria of irreplaceable and vulnerability set out in Langhammer et al. (2007), *Identification and Gap Analysis of Key Biodiversity Areas*.
2. **Degree of threat.** Threats pose a risk, in the short-to-medium-term, to the existence of habitats and ecosystem services vital to priority species and local people.
3. **Funding need.** Given the existing level of conservation investment by national and international donors, an important funding need exists for CEPF investment to address.
4. **Management need.** Given the existing management plans, staffing and infrastructure, and mechanisms for community engagement, an important management need exists for CEPF investment to address.
5. **Civil society capacity.** Civil society groups working in or near the KBA have the potential to act as effective local stewards and champions of the KBA and its trigger species.
6. **Operational feasibility.** Operational obstacles (e.g., insecurity, drug cultivation, legal prohibitions) do not preclude effective CEPF engagement.

7. **Alignment with national priorities.** The KBA is recognized as a biodiversity priority in relevant national strategies.
8. **Opportunity for landscape-scale conservation.** The KBA provides opportunities to achieve landscape-scale conservation through linkage to large KBAs or KBA clusters.

Attachments

- Budget template

Available on Request

- KBA data (available on request)

END OF CALL FOR PROPOSALS