



## **TECHNICAL SPECIFICATIONS – TERMS OF REFERENCE INTELLECTUAL SERVICES**

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### **In respect of the service**

TECHNICAL SPECIFICATIONS – TERMS OF REFERENCE INTELLECTUAL SERVICES

**DEVELOPMENT OF EQUALITY AND INCLUSION POLICY AND TOOLS TO THE BENEFIT OF THE CEPF (CRITICAL ECOSYSTEM PARTNERSHIP FUND)**

CONTENTS

ARTICLE 1.	Presentation of the entities .....	3
ARTICLE 2.	Presentation of the Contracting Department.....	3
ARTICLE 3.	Background and goals of the work .....	3
ARTICLE 4.	Purpose of the contract.....	5
ARTICLE 5.	Service expected under this tender .....	5
5.1	Details of the expected service .....	5
5.2	Specific procedures and requirements.....	6
5.3	Delivery / performance conditions / contact people.....	6
5.4	Expected methodology .....	6
5.5	Estimated time frame for the service, intermediate stages, response times, etc. ....	6
5.6	Expected deliverables.....	7
5.7	Expertise expected of the Service Provider.....	7
ARTICLE 6.	Validation of deliverables by AFD .....	8
6.1	Deliverables validation process.....	8
6.2	Validation criteria for deliverables.....	8
ARTICLE 7.	Constraints imposed by AFD.....	8
7.1	Use of English/French.....	8
7.2	Access by the service provider's employees .....	9
ARTICLE 8.	Resources made available to the Service Provider .....	9
ARTICLE 9.	Provisional schedule for the services .....	9

## ARTICLE 1. Presentation of the entities

### Presentation of AFD:

Agence Française de Développement (AFD) group is a public institution that finances, supports and accelerates the transition to a more just and sustainable world. A French development aid and sustainable development investment platform, we build shared solutions with our partners, with and for the people in developing countries.

Our teams are involved in over 4,000 projects in France, in the overseas territories and in 115 other countries, for the common good of humanity – the climate, biodiversity, peace, gender equality, education and health. In this way, we are thus contributing to the commitment of France and of the French people to the Sustainable Development Goals. For a shared world.

Through **grants, loans, guarantee funds or debt reduction and development contracts**, AFD funds projects, programmes and studies and supports its partners in developing countries with their **capacity building**.

Its subsidiary **Proparco** ([www.proparco.fr](http://www.proparco.fr)) provides support for private investments. Dedicated to mobilising French public expertise, **Expertise France** ([www.expertisefrance.fr](http://www.expertisefrance.fr)) is expected to join AFD Group in 2022.

AFD also works with French and international academic networks to feed into forward-looking discussions and debates on development.

It manages the **French Global Environment Fund (Fonds français pour l'environnement mondial - FFEM)**, which co-finances projects that bridge environmental and development issues.

Full information on AFD, and in particular its Code of Ethics, which the service provider is strongly encouraged to read, can be found at [www.afd.fr](http://www.afd.fr).

## ARTICLE 2. Presentation of the Contracting Department

The CLS division's mission is to support, animate and consolidate the Agency's various activities in the fields of social ties, multi-dimensional inequalities, gender, sport and development, and cultural and creative industries.

## ARTICLE 3. Background and goals of the work

### AFD and the reduction of multidimensional inequalities and inclusion

AFD has adopted a 100% Social Link strategy for 2021-2025, with the first objective being to "Reduce wealth and opportunity inequalities, both vertical and horizontal," and the second to "Strengthen inclusion through better consideration of intervention contexts."

Therefore, AFD is committed to fight against inequality, whether economic, social, in access to both market and non-market services, environmental, territorial, etc. (multidimensional inequalities) through the projects it finances. The consideration of multidimensional inequalities and the inclusion of disadvantaged populations in projects is measured through the "social link: reduction of inequalities and inclusion" dimension of the AFD's sustainable development analysis framework.

AFD supports the design and implementation of key policies, programs and projects that enable to act on barriers for disadvantaged groups to ensure their full participation in social, political and economic life. This include for example inclusive social public policies such as social protection, redistributive tax policies and policies and roadmap for a just environmental transition.

## **CEPF**

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement (AFD), 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.

Since its establishment in 2000, CEPF has supported more than 2,700 civil society partners in 112 countries and territories, awarding \$300 million in grants, and providing capacity building and networking for civil society actors. Within each biodiversity hotspot, CEPF's grant-making is guided and supported by a locally based Regional Implementation Team (RIT). These teams work on the ground directly with CEPF's grantees, helping to build local capacity and implement the strategy set out for the hotspot. At the global level, CEPF is governed by a Donor Council, comprising senior representatives of each of its global donor partners.

CEPF aims to improve the well-being of people living in and dependent on critical ecosystems within hotspots. To this end, it is committed to ensuring that the benefits of CEPF grants are enjoyed equitably by local people, irrespective of gender, ethnicity, sexual orientation, economic status, political representation or other dimensions of inequality. In 2016, CEPF adopted a Gender Policy. During 2023-2024, with support from the Social Links team at AFD, CEPF plans to develop a policy on Equality and Inclusion, and tools to help operationalize this policy.

## **CEPF and AFD Partnership**

Since its arrival in the Donor Council, AFD have been a long-standing partner of CEPF, not only to strengthen its financial capacity but also to support CEPF institutional and operational development and improve its efficiency in delivering the right scope of impacts in line with its ambitious mission. AFD has thus provided this support through different means ranging from a technical assistant delegated to the secretariat in the early 2000s to small grants to support the improvement of CEPF manual of procedures, ESG risk assessments, the integration of gender issues etc.

## **Proposed cooperation: integrate Equality and Inclusion into CEPF strategy and operations**

This new cooperation has been elaborated during the instruction phase of a new program supporting the CEPF work within the Indo-Burma Hotspot, a landscape particularly impacted by climate change due to its high level of ecological and social dependency to water. AFD has thus joint its technical and financial efforts to the one of CEPF and IUCN South East Asia teams to develop a large financing request to the Green Climate Fund. While the Indo-Burma instruction can support the first experimentation of the new methodologies that will be further defined, it is agreed between CEPF and AFD that the purpose of this support is to support the improvement of the corporate processes and methodologies of CEPF so that they can apply in all hotspots where CEPF is present.

Within that working context, **CEPF and AFD teams have exchanged on the fact that the issues of Equality and Inclusion could be better integrated in CEPF procedures** such as the social diligence so that CEPF can allocate its funds in a way that guarantees that when relevant, it can serve the needs of the most vulnerable people and communities in a fair and an informed manner.

This cooperation does not come with a specific planning with regards to the speed at which CEPF should apply a new approach to vulnerability and equality, as this will be decided through the Donor Council once the methodology will be ready to be presented and approved.

## ARTICLE 4. Purpose of the contract

AFD will engage a service provider to undertake tasks described in section 5.1. CEPF will lead in the supervision of the project to integrate Equality and Inclusion into CEPF operations. The project will entail development of relevant materials, consultation with CEPF staff and partners, and training for CEPF and partners.

## ARTICLE 5. Service expected under this tender

### 5.1 Details of the expected service

The service provider, working individually or with a team, will undertake the following tasks. A specific CEPF working group will follow and review the different deliverables, before submission, in accordance with CEPF decision process by the CEPF's technical Working Group.

1. Review the policies of CEPF's donors relevant to Equality and Inclusion, and advise the CEPF Secretariat and Donor Council on development of an appropriate policy for CEPF. This policy should align with CEPF's existing Gender Policy and Environmental and Social Monitoring Framework.
2. Review CEPF's online grants management system, to understand how CEPF collects, stores and analyzes data, in order to gauge the feasibility of any proposed monitoring activities that relate to equality and inclusion issues.
3. In consultation with selected CEPF staff, determine how and to what extent to integrate Equality and Inclusion into CEPF operations. Activities will include:

- a. Determine the goal(s) for integration of Equality and Inclusion into CEPF operations.
  - b. Examine the range of groups that could be considered (vulnerable people, youth, etc.), to inform development of indicators and monitoring processes.
  - c. Develop practical indicators, and describe frequency of data collection, data sources, and methodology and responsibility for data collection.
  - d. Ensure that monitoring recommendations are realistic and fit with CEPF's current electronic grant management system.
  - e. Develop draft guidelines and monitoring tools for CEPF grantees on Equality and Inclusion.
  - f. Recommend changes to CEPF proposal and reporting templates to incorporate Equality and Inclusion requirements.
4. Conduct consultations with CEPF Secretariat and Regional Implementation Team staff to review draft guidelines and monitoring tools.
  5. In consultation with selected CEPF Secretariat staff, engage with CEPF's donors to seek review and approval of Equality and Inclusion materials.
  6. Finalize guidelines and monitoring tools for CEPF grantees, incorporating feedback from CEPF's donors, and translate into French, Indonesian, Portuguese, Russian and Spanish.
  7. Prepare training materials that can be used by the CEPF Secretariat and its Regional Implementation Teams to deliver Equality and Inclusion training to grantees.
  8. Conduct a series of training sessions to introduce CEPF Secretariat and Regional Implementation Team staff to Equality and Inclusion materials.

## 5.2 Specific procedures and requirements

All documents, recordings and videos must be produced in English.

## 5.3 Delivery / performance conditions / contact people

The contract can be performed remotely, or at the premises of AFD, which has its registered office at 5 rue Roland Barthes, 75012 Paris.

The work will be supervised by designated staff from CEPF and the Social Link Division of AFD.

## 5.4 Expected methodology

The service provider may propose the methodology deemed most appropriate for carrying out its activities, in agreement with the project manager.

## 5.5 Estimated time frame for the service, intermediate stages, response times, etc.

The service provision will begin after the contract between the consultancy and AFD has been signed (1 November 2024) and will be completed by 15 June 2025. Deadlines for delivery of deliverables are listed in Article 9.

## 5.6 Expected deliverables

The deliverables are:

1. An Equality and Inclusion policy specific to CEPF.
2. A set of guidelines in English for CEPF grantees comprising definitions, indicators and guidance on integrating Equality and Inclusion considerations throughout the project cycle (preparation, implementation and evaluation), and accompanying monitoring tools.
3. Translations of the guidelines and monitoring tools into French, Indonesian, Portuguese, Russian and Spanish.
4. A set of training materials suitable for use by CEPF Secretariat and Regional Implementation Team staff.
5. Recordings of a series of training sessions to introduce CEPF Secretariat and Regional Implementation Team staff to Equality and Inclusion materials.
6. Conduct a series of training sessions for CEPF and RIT staff
7. Final report to AFD and CEPF.

## 5.7 Expertise expected of the Service Provider

The team of the service provider will be composed of:

- Experts with a good knowledge on policies as regards inequality and inclusion policies which shall demonstrate:
  - A confirmed experience for comparable studies regarding Public Policy implementation and Technical Assistance program's design
  - A proven experience and expertise in the field
  - A real practice of defining projects particularly on funding from international donors,
  - A good knowledge of contexts and issues related to the region concerned
  - Technical expertise on inequality and inclusion policies
  - Proven Experience in defining, writing, and implementing indicators pertaining to Equality and inclusion
  - Proven Experience in compiling and aggregating data pertaining to Equality and inclusion

Legal expertise

- Writing skills and synthesis, and a perfect command of English both written and spoken
- Availability for the planned period

Each reference (relevant experience) should be presented in a succinct manner in order to specify on the one hand the content of the mission and on the other hand the progress and evolutions obtained.

The service provider is also free to present one or more curricula vitae to meet these requirements. The staff required for the mission must necessarily be mixed (local and international experts). Parity between women and men should be sought in the composition of the team.

## **ARTICLE 6. Validation of deliverables by AFD**

### **6.1 Deliverables validation process**

The service provider will be supervised by CEPF.

On receipt of each deliverable, AFD will have 10 working days to validate it or not. If AFD wishes to alter the deliverable, it shall send the Service Provider its comments on those deliverables within 7 working days of receipt. The Service Provider will have 7 working days in which to take those comments into account and produce a new version of the deliverable. This process may be repeated 5 times.

The deliverable will be validated by decision of AFD.

The deliverable will also be reviewed and approved by CEPF's donors (article 5.1).

### **6.2 Validation criteria for deliverables**

- The clarity and readability of the deliverable;
- Compliance with deadlines;
- Compliance with the scope of the requested Service;
- The operational nature of the conclusions of the deliverables;
- The added value compared to the current situation.

## **ARTICLE 7. Constraints imposed by AFD**

In order to compensate for any travel difficulties, the Service Provider must be able to offer all connectivity guarantees enabling the service to be provided "remotely".

### **7.1 Use of English/French**

The performance of the contract requires the permanent use of the English language in dealings with the project owner (documents, meetings, telephone calls, e-mails), in particular for :

- Holding or participating in meetings,



- Development studies, preliminary validations,
- Follow-up reports on supplies delivered and services performed,
- Integration of equipment supplied by AFD,
- Presentation of verification and reports,
- Commissioning and delivery of technical documentation.

Fluency in French will be an advantage.

## 7.2 Access by the service provider's employees

Upon notification of the contract, CEPF will provide to the service provider all relevant documentation relating to CEPF and its current policies and monitoring tools pertaining to gender and social safeguards.

## ARTICLE 8. Resources made available to the Service Provider

CEPF will provide to the service provider all relevant documentation relating to CEPF and its current policies and monitoring tools pertaining to gender and social safeguards. CEPF will provide contact details for CEPF staff and partners.

## ARTICLE 9. Provisional schedule for the services

The assignment of the service provider will require a maximum of 90 person-days and should start by the beginning of Mars 2025. The indicative time schedule of the Assignment shall be as follows:

Milestones	Tentative Dates
Commencement of the service	March 3, 2025
Delivery of the equality and inclusion policy	June 15, 2025
Delivery of the set of guidelines in English for CEPF grantees comprising definitions, indicators and guidance on integrate Equality and Inclusion considerations throughout the project cycle (preparation, implementation and evaluation), and accompanying monitoring tools.	June 15, 2025
Delivery of a Translations of the guidelines and monitoring tools into French, Indonesian, Portuguese, Russian and Spanish.	June 28, 2025

A set of training materials suitable for use by CEPF Secretariat and Regional Implementation Team staff.	July 30, 2025
Recordings of a series of training sessions to introduce CEPF Secretariat and Regional Implementation Team staff to Equality and Inclusion materials.	August 31, 2025
Conduct a series of training sessions for CEPF and RIT staff.	September 30, 2025
Final report to AFD and CEPF	October 15, 2025