

# TERMS OF REFERENCE

## International Consultant

<b>Project Name</b>	Sustainable Financing and Inclusive Management to Perpetuate Madagascar's Locally Managed Marine Areas
<b>Countries</b>	Madagascar
<b>Start Date</b>	January 1, 2025
<b>Duration</b>	9 months

## Background

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A PPG Request was prepared for the project 'Sustainable Financing and Inclusive Management to Perpetuate Madagascar's Locally Managed Marine Areas' and approved by the GEF Secretariat on 12 December 2024. The CEO Endorsement Request submission package is due within 9 months from this approval date (by 11 September 2024)

This project is an initiative of the Ministry of Environment and Sustainable Development (MEDD) aiming at ensuring sustainable financing and support to marine ecosystems conservation following the realization of Madagascar government commitment to increase its marine protected areas, also known as the Sydney Promise. Under the leadership of the MEDD, with the Fondation pour les Aires Protégées et la Biodiversité de Madagascar (FAPBM) and Tany Meva as executing partners and WWF US as the GEF Agency, the project aims to facilitate sustainable financing solutions and effective and inclusive management practices to strengthen the conservation and sustainable use of coastal and marine biodiversity in LMMAs across three seascapes in Western Madagascar (Diana, Manambolo-Tsiribihina, Mahafaly), including critical mangrove and coral reefs, for people, biodiversity and climate.

The project consists of the following components:

- Component 1: Enabling Environment for LMMA effective management (National)
- Component 2: Sustainable Finance solutions and Strengthened Conservation Trust Funds (CTF) Capacities to support LMMAs (Sustainable financing options for specific seascapes and LMMAs)
- Component 3: Inclusive Management for an effective and social and ecologically resilient LMMA Network (site-level)
- Component 4: Knowledge management and communications

The approved PPG Request is included as a separate attachment.

## Objective

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The Lead Project Development Consultant will lead the development of project documents for the project "Sustainable Financing and Inclusive Management to Perpetuate Madagascar's Locally Managed Marine Areas," working closely with MEDD dedicated departments and other government partners, national consultants, WWF Madagascar, WWF GEF Agency, FAPBM, Tany Meva, and other key stakeholders. The

consultant will be responsible for developing a comprehensive project design in support of MEDD and government priorities and in accordance with WWF and GEF standards. The consultant may assemble a team and/or delegate tasks as detailed in their technical and financial proposal.

The consultant will ensure timely delivery of the full WWF GEF Project Document submission package, including: the WWF GEF Request for CEO Endorsement Request (CER) document, Required Annexes, Climate Risk Assessment, Safeguards Assessments, Documentation and Management Plan, Gender Analysis and Gender Action Plan, Stakeholder Engagement Plan, Letters of Co-financing, and other requested materials as mutually agreed in the project development workplan.

## **Responsibilities**

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The consultant(s) will report to the Project Development Team (PDT – described further below) and under their guidance lead the overall project preparation process and deliverables and be home-based, with field missions to Madagascar. The consultant(s) is expected to undertake the following tasks:

### **1. Review**

- Thorough desk review of the project PPG request, CEO ER Template and supporting documents, WWF and GEF policies;
- Desk review of relevant literature and documents, baseline studies, current/previous GEF projects, terminal evaluations, safeguards and gender related reviews, WWF's Environmental and Social Safeguards Integrated Policies and Procedures (SIPP), the WWF landscape screenings for the project land/seascapes; and any other documentation relevant to the development of the project.

### **2. Coordination**

- Coordinate with the Project Development Team (PDT) for overall planning and development of the project design and associated documentation needed for GEF CEO Endorsement;
- Develop a project development plan (workplan, timeline, etc), for finalization at the kickoff workshop;
- Coordinate overall planning and development of the project design and associated documentation needed for GEF CEO Endorsement;
- Orient, guide and coordinate the various workstreams and consultants (national consultant, safeguards, gender, climate) to inform project design;
- As needed, prepare documentation for and participate in team meetings and regular project check-ins (e.g. by zoom or skype);

### **3. Project design and development**

In support and under the guidance of the PDT, lead development and drafting of the WWF GEF CER Document and accompanying documentation (Request for CEO Endorsement document, Annexes, GEF core indicators, Letters of Co-financing, and other requested materials) in accordance with the approved work plan. Responsible for final delivery of the full Project Document submission package.

- Build out from PPG stage and further the development of the project's technical design elements, including barriers, baseline, strategies/activities, and the project theory of change. The project design should incorporate lessons and best practice from past projects and evaluations and take a co-development approach:

- Collect inputs and document key baseline information with assistance of the national consultant(s);
- Design the project strategy to activity level, site identification and selection, develop the Results Framework and identify Core Indicator targets, budget, and project risk management framework;
- Ensure project Theory of Change and interventions are technically substantiated as well as cost-effective;
- Ensure compliance with GEF, WWF, and government policies and best practices for quality project development, including social and environmental safeguards, financial management, public involvement, gender and social inclusion mainstreaming, monitoring and evaluation, and incorporating lessons learned from past projects;
- Under MEDD guidance, develop project governance including the reporting and financial arrangements, management, and decision-making structure between the GEF Agency, the Project Management Unit, the Executing Agency, the Project Steering Committee, and any subgrantees that will be receiving GEF funds. A Terms of Reference for Project Management Unit positions and Project Steering Committee should be included;
- Incorporate feedback from MEDD, other government departments as relevant, WWF, stakeholders, and GEF Sec/STAP reviews;
- Prepare the response matrix to the GEF Secretariat, Council and STAP comments (as needed) until CEO Endorsement;
- Draft and revise documentation as needed to demonstrate full due diligence throughout project development.

The consultancy will include consultant(s) with stakeholder engagement, safeguards and gender qualifications.

#### **4. Stakeholder Engagement:**

- Support as appropriate in the interaction with relevant government departments (Ministry in charge of land use and spatial planning, Ministry in charge of Fisheries, Ministry in charge of Mining, MNP, DREDD, etc.), project partners, communities and other PA managers, and other stakeholders. Document these interactions. He/she may delegate specific tasks as appropriate;
- Participate in and lead the organization of key workshops such as the PPG Kick-off, Design and Validation Workshops; Coordinate these workshops with MEDD and government departments and other relevant stakeholders and draft the workshop reports with inputs by national consultant(s);
- In close cooperation with the MEDD/DREDD, Project Development Team and WWF GEF Agency, and with assistance from the national consultants, develop methodology/process for stakeholder consultations and gender action plan according to WWF gender and safeguards policies to ensure project ownership, as well as climate risk assessment, inform project design and buy-in at national level and in target landscape and project sites. All of the processes have to be in compliance with WWF and GEF policies;
- Ensure proper and meaningful local community and other key stakeholder consultations to inform project design, in compliance with WWF and GEF policies. This is to ensure that key stakeholders are meaningfully engaged, their interest in the project is understood, and their feedback on proposed project activities is obtained and documented:

- The consultant will be responsible for identifying communities (in coordination with national consultant(s)) who may be affected by the project, engaging these communities to ensure an inclusive consultation process and inform the project strategy, and working with the communities to develop a plan for their engagement during implementation of the project;
- Deliver a Stakeholder Analysis and Stakeholder Engagement Plan, according to MEDD best practice, and GEF and WWF standards and guidance and using WWF GEF templates;
- Integrate gender considerations and stakeholder feedback into project design;
- Document all consultations using the template supplied by the WWF GEF Project Manager.

#### 5. **Gender Mainstreaming:**

- Complete a gender analysis and develop a Gender Action Plan according to MEDD best practice, and WWF and GEF standards and guidelines and using the WWF GEF template, and ensure findings are meaningfully integrated into the project design by proactively seeking opportunities for gender inclusion and women's empowerment in the project strategy and activities, and setting indicators and targets that will show project impact in women's empowerment specifically and as gender-disaggregated data in implementation;
- Ensure stakeholder consultations are done with a gender-sensitive and inclusive approach and to proactively solicit women's input and feedback in the process of project design consultations;
- Collect gender-specific data during stakeholder consultations to inform the Gender Analysis and Action Plan.

#### 6. **Safeguards:**

The Consultant is expected to prepare the necessary safeguards documents on behalf of the PDT to comply with WWF's Environment and Social Safeguards Framework (ESSF), as detailed in the [Safeguards Integrated Policies and Procedures \(SIPP\)](#). This includes undertaking the following tasks:

##### a) Policy, legal and administrative framework

Analyze the policy, legal and administrative framework within which the project takes place and identify any laws and regulations that pertain to environmental and social matters relevant to the project. This includes:

- Regulations about assessment and management of environmental and social risks;
- Policies and regulations related to issues covered by WWF Environment and Social Safeguards Integrated Policies and Procedures;
- Requirements for public consultation and disclosure;
- Environmental authorization procedures relevant to the project; and
- Policies and regulations implementing the host country's obligations under international law (e.g. on indigenous peoples, human rights, etc.).

If gaps are identified, it has to be described how these will be addressed by the project.

##### b) Environmental and social baseline

Describe and analyze the environmental and social context in which the project operates. The main purpose of this step is to provide an understanding of current environmental and social conditions that form the baseline against which project impacts can be predicted and measured during project

implementation. While some broad contextual information is necessary, the analysis should focus on the immediate context of the project site and aspects that relate to the identified impacts in order to be relevant to decisions about project design, operation, or mitigation measures. The analysis will cover a range of physical, biological, socio-economic and cultural conditions relevant and/or potentially impacted by the project.

c) Identification of affected groups

Based on the stakeholder analysis, stakeholders need to be identified that might be affected by project activities (positively or negatively). The analysis should cover all relevant social groups present in the sites, in particular vulnerable groups, indigenous, tribal or traditional peoples. It should consider formally organized stakeholder groups such as government organizations, civil society organizations, academia and private sector as well as individuals present in the intervention sites without any formal organization. The identification of affected groups is instrumental for identifying the stakeholders to be consulted during the development of the ESMF. This activity will require coordination with the stakeholder engagement consultant and gender consultant to ensure proper identification of stakeholders and project affected people.

d) Assessment, prediction and significance of environmental and social impacts

This Project is considered a moderate-risk project and hence does not require a scoping study. Therefore, the first step is to complete and substantiate the results of the ESS Screening by confirming potential impacts and/or identifying other potential impacts in consultation with relevant stakeholders and key informants. The WWF GEF Agency Safeguards Coordinator will make a determination of which safeguards management plans are needed based on this ESS Screening.

Once the list of impacts has been consolidated, predictions need to be made in terms of the impact's probability and their magnitude. In accordance with the WWF's Policy on Environment and Social Risk Management, the assessment should pay particular attention to impacts related to the WWF Environment and Social SIPP such as adverse impacts on indigenous peoples, cultural heritage, biodiversity or on people's livelihood through access restrictions or resettlement. However, thematic coverage of the WWF's Policy on Environment and Social Risk Management also involves other potential social impacts including impacts on women or vulnerable groups, health and safety risks, environmental risk issues not covered by the Standard on Protection of Natural Habitats or risks triggered by the project failing to take climate change effects into consideration.

When analyzing the risks both direct and indirect impacts should be taken into consideration, such as inadvertent knock-on effects or cumulative effects that materialize through interaction with other developments, impacts occurring at the project site or within the project's wider area of influence and impacts triggered over time. Once the impact issues have been confirmed, they need to be rated on their significance, which is important for prioritizing the mitigation measures. For social impact issues this task should be undertaken in consultations with the respective affected groups. Significance rating should consider the expected likelihood of the potential impact and the impact's anticipated magnitude. The magnitude is influenced by factors such as sensitivity of receptor, severity of impact, manageability of impact, its duration and reversibility.

The methods and analytical tools for analyzing impacts should be commensurate with the type and significance of the impacts. It should allow rigorous assessment of the significant impacts using qualitative and to the extent possible, quantitative methods. Participatory research and assessment

tools should be employed wherever sensible to enable participation of affected groups in the assessment of significance of impacts and the development of mitigation measures.

e) Environmental and social management framework (ESMF)

The main output of the ESMF process is a strategy for managing risks and mitigating impacts at the project sites. The aim of the project is to arrive at a suite of interventions for achieving intended restoration and ecosystem management outcomes in which adverse environmental and social impacts are avoided; if complete avoidance is not feasible it will need to be ensured that impacts are minimized and/or compensated for in a fair, equitable and agreed way. Based on the screening, a Process Framework and Indigenous Peoples Planning Framework may also be required.

See Annex A for an outline of the required safeguards documents, including expected content.

## **7. Climate:**

- Taking into the GEF guidance on climate screening: (1) produce relevant documentation on project site intervention's environmental and socio-economic circumstances; develop climate risks impact chains that concern target ecosystems and economical productivities in order to identify adequate policies and measures:
  - Risk assessment will mainly concern coastal and marine ecosystems, but also sectors that have impact and depend on the ecological services provided by coastal and marine ecosystems;
  - Identify the main vulnerability factors to climate change for coastal and marine ecosystems, and for sectors and subsectors that have impact and depend on the ecological services provided by coastal and marine ecosystems;
  - Identify the main climate risks regarding coastal and marine ecosystem and the main sectors and subsectors potentially affected by these climate risks;
  - Identify vulnerable areas and adaptation options in accordance with a sustainably locally managed marine areas;
- Estimate and refine the emissions reduction potential of project interventions on the different sites using relevant tools and methodology (IPCC Wetlands Supplement 2013; FAO EXACT tool) and establish a baseline for future impact assessment and monitoring.

## **Deliverables**

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The consultant will lead the overall preparation process and submit the following deliverables to the PDT:

- The completed Project CEO Endorsement Request and all required Annexes in the required format, in English and French. Template(s) will be provided by WWF GEF Agency.
- Minutes of key meetings/workshops, with lists of participants, date, locations, and input from stakeholders;
- Field mission reports, for 1-2 field missions as needed
- Responses to STAP, GEF and WWF internal reviews;

- Safeguards Documentation, complying with WWF and GEF policies and procedures, and according to provided template. Documents include:
  - Environmental and Social Safeguards Screening
  - Environmental and Social Assessment Report
  - Environmental and Social Management Framework, potentially including based on the Screening:
    - Process Framework
    - Indigenous Peoples Planning Framework
  - A Stakeholder Engagement Plan according to provided template, containing gender-sensitive indicators
- A Gender Analysis and Gender Action Plan, using provided template
- A Climate risk screening and management plan that includes:
  - Baseline GHG emission and emissions reduction potential of project interventions;
  - Adaptation options that include maps of vulnerable areas, budgeting for the management plan, and gender-sensitive indicators.

## Payment schedule

Deliverables	Due date	Payment structure
<ul style="list-style-type: none"> <li>• <a href="#">Project Workplan</a> and timeline</li> <li>• <a href="#">Kick-off Workshop</a> and report</li> <li>• Field mission 1 report, with documentation of stakeholder consultations</li> <li>• <u>Draft 0 of key sections of the CEO Endorsement Request (CER) and Annexes</u>, including:               <ul style="list-style-type: none"> <li>○ CER Section A: Project Rationale (background, situational analysis, barriers)</li> <li>○ Intervention strategy / activities</li> <li>○ Institutional Arrangement</li> <li>○ CER Section on Risks</li> <li>○ CER Section C: Alignment With GEF-8 Programming Strategies and Country Priorities</li> <li>○ Results Framework (including Core indicators)</li> <li>○ Draft appendix on site selection</li> <li>○ Theory of Change</li> <li>○ Draft gender action plan, stakeholder engagement plan, ESS Screening, safeguards plans, climate risk screening and management plan</li> </ul> </li> </ul>	<i>Est. May-June 2025</i>	<b>50%</b>
<ul style="list-style-type: none"> <li>• <u>Full draft 1</u> of CER and Annexes</li> <li>• Validation workshop and field mission 3 report</li> <li>• <u>Final Draft of CER</u> submission package, with responses to review and validation workshop</li> </ul>	<i>(est. July-August 2025)</i>  <b>By 1 September 2025</b>	<b>40%</b>

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<ul style="list-style-type: none"> <li>• Responses to GEF Sec reviews, revised submission package</li> </ul>	<b>Until CEO Endorsement</b>	<b>10%</b>
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## Logistics, Team, Collaboration, and Supervision

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The Project Development Team (PDT) will lead and guide the consultant(s) to ensure a quality project development process and deliverables that align with government and partner priorities, and are in compliance with WWF and GEF policies and guidelines. The Project Development Team will include representatives from MEDD, WWF Madagascar, WWF GEF Agency, FAPBM, and Tany Meva.

MEDD will provide overall guidance and technical input to the project design, hosting-national level workshops, participating in stakeholder consultations, etc., as agreed in the workplan.

WWF Madagascar will provide logistical support to the consultant, including the hosting of meeting space and facilitating dialogue with government. WWF Madagascar will also lead government relations for project development and can provide technical input to project design. The consultant will coordinate closely with the key WWF Madagascar staff.

The consultant will administratively report to the *WWF GEF Agency* project manager. The manager will provide guidance on WWF GEF project development process and requirements, assess the quality of all deliverables, facilitate reviews of the deliverables, and will approve deliverables for payment. WWF GEF Agency will handle communications with the GEF Secretariat. WWF GEF Agency will also facilitate a review process with the PDT, including a three-stage review of (a) intervention strategy and an outline of key information in the CER, (b) full draft CEO Endorsement Request Documents, (c) final draft of CEO Endorsement Request. The review panel will include the PDT, key stakeholders, the extended WWF GEF Agency team, and may include WWF and external specialists on marine management and conservation finance. The consultant will participate in any review meetings and will incorporate key review points into the project design and documentation and will provide a response matrix.

## Minimum qualifications and experience

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Consulting Firm or individual consultant must have:

- Master's Degree in Natural Sciences, Public Policy, Social or other related fields;
- At least 10 years of experience in developing, implementing/executing and/or evaluating complex international projects;
- Extensive Knowledge of the Global Environmental Facility (GEF) required;
- Experience and successful track record in major project development, specifically in GEF project development required;
- Ample experience working with government agencies and regional governance bodies, specifically in the region and, preferably, with multiple government bodies;
- Demonstrated expertise in gender responsive project design;
- Experience on gender mainstreaming, stakeholder engagement, and safeguards;
- Experience on climate risk assessment and GHG monitoring;
- Experience working with and managing multi-disciplinary teams and in delegating tasks remotely;
- Excellent facilitation, negotiation, analytical, research and presentation skills;
- Excellent verbal communication and writing skills in English and French;
- Experience writing proposals and reports.

Preferred qualifications:



- Knowledge in and experience in assessing and analyzing long-term financing mechanisms and opportunities for conservation of biodiversity and ecosystems.
- Knowledge of LMMA's, community resource management, coastal and marine ecology (preferably within Madagascar context);
- Experience working in Madagascar;
- Familiarity with WWF Network;
- Experience with Open Standards/Project and Program Management Standards (PPMS) in the GEF context.

## **Annex A – Information on the expected content of the safeguards deliverables**

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### Environmental and Social Management Framework (ESMF)

The ESMF should include the following sections:

1. Executive Summary
2. Introduction
3. Project Description
4. Project Area Profiles
  - An environmental and social baseline to monitor the effectiveness of mitigation measures; social baseline to be disaggregated between relevant social groups (e.g. vulnerable groups, indigenous people, etc.); studies to include demographic profiles, population mapping, poverty assessments, disaggregated socio-economic indicators (e.g. natural resource dependence, social inclusion, etc.)
5. Environmental and Social Policies, Regulations and Guidelines
  - An analysis of the legal national framework for addressing social and environment impacts and a gap analysis between the national framework and WWF's ESSF
6. Institutional Arrangements
7. Anticipated Environmental and Social Impacts and Mitigation Measures
  - An assessment of environmental and social risks including risk matrix specifying likelihood and magnitude of each impact issue;
  - Identified mitigation measures presented with budget, implementation schedule and organisational responsibilities;
8. Procedures for the Identification and Management of Environmental and Social Impacts
  - Development of other safeguard tools as required by the due diligence and screening of the project and the respective safeguards policies triggered;
9. Guidelines for ESMP Development
10. Process Framework (PF) (see section below)
11. Indigenous People Planning Framework (IPPF) (see section below)
12. Grievance Redress
  - Development of a project-level grievance mechanism;
13. Capacity Building
14. Disclosure
15. Monitoring
  - A list of key environmental and social indicators is identified and mainstreamed into the results framework and included in the project M&E plan.
16. Budget

### Process Framework (PF)

It is reasonable to assume that some decisions taken by the Government could restrict access to natural resources and will not fall solely within the authority of the IPLCs and other local communities. Therefore, WWF's Standard on Restriction of Access and Resettlement has been triggered on a precautionary basis and the consultant may need to prepare a Process Framework (PF) in line with the SIPP. Should there be the possibility of access restriction identified in the Environmental and Social Safeguards Screening, a Process Framework will be developed as part of the ESMF.

The purpose of this Process Framework is to ensure participation of Project Affected People (PAP) while recognizing and protecting their interests and ensuring that they do not become worse off because of the project. Specifically, the PF will:

- Describe activities that may involve new or more stringent restrictions on use of natural resources in the project area.
- Establish the mechanism through which the local communities can contribute to the project design, implementation and monitoring.
- Identify the potential negative impacts of the restriction on the surrounding communities.
- Describe the mitigation measures required.
- Describe the grievance procedure or process for resolving disputes to natural resource use restrictions.
- Describe the participatory monitoring arrangements with neighbouring community members

The intent of the framework is to ensure transparency and equity in the planning and implementation of activities by the project. This framework would detail the principles and processes for assisting communities to identify and manage any potential negative impacts of the project activities. Since the exact social impacts will only be identified during project implementation, the Process Framework will ensure mitigation of any negative impacts from project through a participatory process involving the affected stakeholders. It would also ensure that any desired changes by the communities in the ways in which local populations exercise customary tenure rights in the project sites would not be imposed but should emerge from a consultative process.

#### Indigenous Peoples Planning Framework (IPPF)

The WWF's Standard on Indigenous Peoples (IPs) is triggered for this project on a precautionary basis. Based on the Environmental and Social Assessment, the consultant may be required to prepare an IPPF. If an IPPF is required, the consultant should prepare one that describes measures/recommendations to strengthen the project's IPLC engagement into the final project design.

An IPPF should contain the following elements:

- An introduction to the types of components, subcomponents, and subprojects likely to be proposed for financing under the project;
- A short introduction to the vulnerable/marginalized indigenous peoples who might be affected by the project (ethnicity, demographics, socioeconomic situation, etc.);
- The potential positive and adverse effects of the project on the IP;
- A plan to carry out social assessments for such programs/subprojects;
- A framework to ensure FPIC and consent processes with the affected IP's communities at each stage of the preparation and implementation of the project;
- Institutional arrangements (including capacity building where necessary) for screening project-supported activities, evaluating their effects on IP, preparing IPPs, and addressing any grievances;
- Monitoring and reporting arrangements, including mechanisms and benchmarks appropriate to the project; and
- Disclosure arrangements for IPPs to be prepared under the IPPF.