



BE-CLME+ Project: Promoting National Blue Economy Priorities Through Marine Spatial Planning in the Caribbean Large Marine Ecosystem Plus (GEF Project ID 10211)

Terms of Reference for a Regional Consultancy to Assess the Training Needs and Develop MPA Management Training Materials that Prioritizes Marine Spatial Planning, Blue Economy, and Ecosystems-Based Fisheries Management

1.0 Background & Justification.

1.1 The BE-CLME+ Project is a regional initiative aimed at promoting Blue Economy (BE) development in the Caribbean region through Marine Spatial Planning (MSP) and Marine Protected Areas (MPAs), Ecosystem Approach to Fisheries (EAF), development of climate-smart sustainable fisheries value chains, and knowledge management in Barbados, Belize, Guyana, Jamaica, Saint Lucia, and Panama. The Caribbean Regional Fisheries Mechanism (CRFM) is the Executing Agency for the project, while the Development Bank of Latin America and the Caribbean (CAF) and the Food and Agriculture Organization (FAO) of the United Nations are the Global Environment Facility (GEF) Co-Implementing Agencies.

1.2 The 2024-2025 BE: CLME+ Project Workplan & Budget was approved by the Regional Steering Committee on 6th September 2024, and calls for a consultancy to assess the Training Needs and Develop MPA Management Training Materials that Prioritizes Marine Spatial Planning, Blue Economy, and Ecosystems-Based Fisheries Management.

1.3 The coastal ecosystems of the Caribbean Region support sustainable fisheries, marine aquaculture, marine eco-tourism, and are instrumental in mitigating the effects of climate change. These ecosystem services are currently undervalued, yet their contribution to a healthy planet, income generation, national economies, and a positive climate change agenda is significant. Unlike Panama, which places substantial emphasis on the financial and agriculture sectors, and the Panama Canal as the primary economic drivers, Caribbean Islands are heavily reliant on tourism and fisheries, the primary economic drivers, both of which are heavily dependent on the sustainable management of marine resources.

1.4 With approximately 10,000 square kilometres of reef, 22,000 square kilometres of mangrove, and as much as 33,000 square kilometres of seagrass beds, the use of MPAs has become increasingly popular and important to countries as an area based management tool to improve the conservation of marine biodiversity, address the impacts of overfishing, decrease user conflicts, and provide economic opportunities to local coastal communities. This has resulted in substantial knowledge gained on optimal site selection and design, successful outreach approaches, effective management strategies, and appropriate methods to evaluate their effectiveness. While the Caribbean has been a leader in MPA establishment, some CARICOM countries, such as Guyana, have been slower to adopt new MPAs, potentially not meeting the goals and targets of the Kumin- Montreal Global Biodiversity Framework.



1.5 Through project support an estimated total 176,830.07 hectares (Ha) of MPA will be created or expanded, with 290,239.71 hectares of MPAs/ OECMs created under or under improved management for conservation and sustainable use. As such, as MPAs continue to be proposed and implemented, the efficient exchange of information and capacity building and training among government and stakeholders is now more critical than ever.

2.0 Objective of the Consultancy.

The objective of this consultancy is to assess the training and capacity needs of relevant national agencies to effectively design, establish and manage MPAs and other area-based management areas such as OECMs; and develop MPA management training curriculum and supporting training materials that prioritizes marine spatial planning (MSP), Blue Economy (BE), Ecosystems-Based Fisheries Management (EbFM), and Other Effective Area- Based Conservation Measures (OECM). The training curriculum and supporting training materials developed under this consultancy will be such that they can be utilized for training both online and in-person, as appropriate. The MPA management training curriculum and supporting materials will also seek to enhance participatory governance and management capacity of Member States.

The deliverables from this consultancy will be used in the implementation of future MPA management training activities under this BE CLME+ project which seeks to develop and implement training on MPAs and Ecosystem- Based Fisheries Management as part of Component 3 (Outcome 3.3: Knowledge shared between Caribbean countries and organizations, and GEF IW projects in partnership with IW: LEARN). As such, the consultant may be expected to participate/ contribute to the development and implementation of planned MPA management training activities. The MPA management training curriculum and supporting training materials will also be made available to other Caribbean countries by the CRFM as well as global dissemination e.g. via IW: LEARN platform; and will include case studies that demonstrate best practice and lessons learnt from within the region a further afield.

3.0 Key Activities will include, but not be limited to those listed below.

3.1 Prepare Inception Report and Work Plan: The consultant will need to prepare a detailed workplan outlining, amongst others, the activities to ensure the successful delivery of; the schedule inclusive of milestones of the project and performance monitoring and evaluation; etc. Contingencies must be built into planning to allow the consultant to adapt to changing conditions. In preparing the workplan the consultant will present on the workplan and schedule at an inception meeting convened by the CRFM, with attendance from other relevant agencies upon commencement of the assignment to:

- a) Review the process for the conduct of all activities within the scope of services;

- b) Determine roles and responsibilities,
- c) Discuss the basis on which this work will be implemented, and
- d) Finalise the work plan and schedule. A final work plan and inception report (Product 1) on the outcome of the inception meeting will be prepared by the consultant and submitted to the CRFM for review and approval.

3.2 Undertake a Training Needs Assessment and prepare report: The consultant will;

- a) Assess MPA management capacity training needs of MPA management agencies to be included in the training of beneficiary countries. The training needs assessment should determine national and institutional knowledge and capacities; country level priorities for the designation of new MPAs, expansion of existing sites and/ or improving the management effectiveness of existing MPAs.
- b) Review and assess existing regional and national MPA Management training material and other similar resources and platforms; identifying areas to strengthen and improve partnerships, building on existing capacities.
- c) Make recommendations on the core suite of topics/ thematic areas for training to MPA management authorities at the national level. The recommendations should consider opportunities for peer learning and mentorship among beneficiary countries on lessons learnt and management experiences.
- d) As part of the recommendations for training needs, identify the impact/benefits of the training areas at the national level. This should also include a prioritisation of the training needs.
- e) Identify key personnel and agencies e.g., Food and Agriculture Organisation of the United Nations (FAO) that can deliver on training topics/thematic areas that are integral to the effective development and management of MPA, conservation of biodiversity, including use planning as it relates to the protection/conservation of marine habitats, and Ecosystem Based Fisheries Management.
- f) Prepare a training needs assessment report that will serve as a baseline to inform the design of the training curriculum and supporting materials; and technical guidance for countries in the process of establishing new MPA, expansion of existing areas, and improving MPA management.

3.3 Conduct validation workshop and prepare workshop report: In coordination with the CRFM/PMU, the consultant will organise and convene a regional workshop with key stakeholders and partners to present and validate the results and findings of the MPA Needs Assessment and its recommendations. The outline of the training curriculum will also be presented as well as discussions to determine national training priorities based on the needs identified. The consultant will prepare a final national workshop report which would include, workshop activities and discussions, next steps, and a gender disaggregated list of participants. Feedback and discussions from the validation meeting also inform the development of the MPA management training curriculum and supporting materials.

3.4 Prepare Training Curriculum and supporting training materials: Subject to the outcome of activity 3.2 and 3.3, the consultant will develop a Training Curriculum and support training materials (fact sheets,

case studies, work sheets, videos, power point presentations, knowledge assessment tools, etc.) that will be used to guide training activities to be delivered. The training curriculum and supporting materials should;

- a) Adequately address the specific requirements and knowledge gaps of MPA Managers and persons integral to the development and management of MPA in project participating countries to successfully embrace the principles of MSP, BE, OECMs, and Ecosystems-Based Fisheries Management in day-to-day MPA management.
- b) Account for the varying degrees of MPA management capacity and training needs; in this regard the training curriculum, materials, course structure, and tools used to deliver the training must allow for flexibility in meeting the differentiated needs of trainees and beneficiary countries.
- c) Include, but not limited to, elements to improve understanding of the contribution of MPAs and other area based management approaches to the recovery of exploited fishery stocks; the protection of entire ecosystems by conserving multiple species and critical habitats; the reduction of conflict between fishers and other resource users; as a necessary tool but not a substitute for comprehensive fisheries management; the role of stakeholder participation, understanding and local acceptability; monitoring and enforcement as key elements for the success of MPAs; balancing of new and emerging scientific, social and economic needs and realities of MPA management; implementation of Other Effective Conservation Measures (OECM's); and the use of tools to monitor and evaluate the management effectiveness of MPAs.
- d) Clearly define the learning objectives for the overall curriculum and for each module, profile of the targeted trainees; create content that meet the intended needs and objectives (media, text, visuals, case studies, lessons learnt, handouts, videos and other interactive elements); design the most effective and efficient delivery (in-person, online, blended); and assessment method to facilitate participation and trainees' evaluation of the training (MCQ quizzes, group exercises, breakout rooms) in a user-friendly format.
- e) The training materials/ curriculum modules should be able to be used either as a stand-alone curriculum or as modules in the training curriculum and eLearning modules.
- f) The training curriculum/materials should be easy to understand and practical, providing "how-to" guidance on the approaches and processes required for the selection, establishment, declaration, and management of MPAs and other area-based conservation measures, including means of integrating traditional knowledge.
- g) The materials should include detailed and practical case studies from within the Caribbean and other regions of the world. Partners should be identified for developing the case studies.
- h) The training material should be English and Spanish.

3.5 Consult with the CRFM/PMU and be informed of the **Environmental and Social Safeguards (ESS)** triggered by the BE: CLME+ Project and ensure the MSP Protocol is in compliance with the ESS triggered by the BE: CLME+ Project.



4.0 Expected Outcomes and Deliverables.

4.1 The consultant(s) are expected to deliver the following products:

Product 1: an Inception Report and workplan detailing activities, milestones, timeline, and a robust methodology to carry out the assignment.

Product 2: Draft Report - Assessment of MPA Management Capacity Training Needs and Draft Curriculum with supporting training material.

Product 3: Final Report - Assessment of MPA Management Capacity Training Needs, Final Curriculum with supporting training material.

Product 4: Materials consistent with Section 6.0 of these Terms of Reference.

5.0 Project Schedule and Milestones.

Deliverable	Date	Payments
Product 1: Inception Report detailing activities, milestones, timeline, and a robust methodology to carry out the assignment.	0.5 month after contract signature	10% of contract value
Product 2: Draft Report – Assessment of MPA Management Capacity Training Needs and Draft Curriculum with supporting training materials.	2.5 months after contract signature	40% of contract value
Product 3: Final Report - Assessment of MPA Management Capacity Training Needs, Final Curriculum with supporting training material	3.5 months after contract signature	35% of contract value
Product 4: Materials consistent with Section 6.0 of Terms of Reference	6.0 months after contract signature	15% of contract value

6.0 Reporting Requirements.

6.1 The consultant will present the deliverables following the schedule established in section 5 of these terms of reference. The deliverables must include reports in Word¹, PowerPoint presentation of major findings and recommendations, and other documents used as the basis of the analysis (including other formats such as Excel spreadsheets, etc. as applicable) and a folder with the list of bibliographic references used to develop the analysis. All materials must be delivered in English and Spanish. All reports, studies, plans, drawings, source code, technical data, specifications, and any other material prepared exclusive property of the CRFM and as such the CRFM has exclusive title, rights, and interest in all such material including the right of dissemination, reproduction, and publication. The consultant will

¹ All reports should follow the CRFM Guidelines for Publications and Reports



also work closely with the Regional Project Coordinator and the Marine Spatial Planning Specialist of the BE: CLME+ Project on the assignment.

7.0 Acceptance Criteria.

7.1 Payments will be authorized once the CRFM accepts the products specified by the TOR. The CRFM will have up to three weeks to provide written comments/recommendations to the consultant(s) reports. Unless previously determined, the CRFM will generally accept the deliverables once the consultant or consulting firm confirms the following: (i) receipt and additional inclusion of comments/recommendations in a revised version and (ii) provision of date for presentation of the revised versions of the submitted deliverables. The consultant(s) are expected to include these comments two weeks after receipt.

8.0 Consultant's Effort and Required Skills

8.1 This consultancy has been estimated to require a maximum of 45 Consultant Days.

8.2 Applicants should meet the following requirements:

- Master's Degree in Marine Management, Fisheries Science, Natural Resource Management, Coastal Zone Management, or Marine Science is desirable.
- Minimum of 7 years' experience in undertaking similar capacity and training needs assessments of public sector agencies, NGOs and CBOs.
- Work experience in any or all the project countries.
- Experience in the elaboration and development of training modules and curriculum that covers topics relevant to, *inter alia*, ecosystem- based fisheries management, MPA, MSPs, OECMs, etc. to be implemented online and in-person.
- Ability to work with senior government officials, non-governmental organizations (NGOs), and local communities.
- Experience working with resource users across multiple sectors, especially in the fisheries, protected areas, tourism, and maritime transport, etc.
- A good understanding of biodiversity, Marine Protected Areas, Climate Change, Marine Spatial Planning.

9.0 Application and Selection Procedure.

9.1 Interested consulting firms are invited to submit their Technical and Financial Proposal outlining observations on these Terms of Reference, understanding of the objectives of the assignment, details of methodology to be applied, proposed work plan and timeline, personnel to be involved, skills and Curriculum Vitae of **all proposed team members**, declaration of availability, declaration of no conflict of interest, and tax-inclusive price proposal with details of professional fees for team members, logistics, travel, printing, and all other associated costs.



9.2 Technical and Financial Proposals will be evaluated using a Quality and Cost-Based Selection procedure, in which the Technical Proposal can be awarded a maximum of 70% of the evaluation score and price a maximum of 30% of the evaluation score.

9.3 Please submit your application in PDF format by **January 15th 2025** to jobs@crfm.int and secretariat@crfm.int.