

# TERMS OF REFERENCE

DRAFT PREPARED FOR BLUE ACTION PROPOSAL "MAKING NETWORKS WORK"  
DATE: 21.08.2024

**PURPOSE OF CONTRACT:** Coastal Fisheries and Resource Management Consultant for Rare's Blue Action Fund proposal

**PROJECT:** Making Networks Work: Empowering fisher communities for effective stewardship of the Philippines' largest Marine Protected Area.

## 1. BACKGROUND TO THE PROJECT

Following its submission of a concept note to the Blue Action Fund under the [Asia-Pacific Region](#) (2023), Rare, in partnership with the Negros Women for Tomorrow Foundation (NWTf), anticipates receiving a preparation grant to support the development of its full proposal entitled "Making Networks Work: Empowering fisher communities for effective stewardship of the Philippines' largest Marine Protected Area."

The main objective of the proposed project is to enhance the management effectiveness of the Tañon Strait Protected Seascape (TSPS), covering 5,000 km<sup>2</sup> of globally significant, inter-connected, and climate-resilient coastal ecosystems. At the seascape level, the project aims to strengthen the DENR Protected Area Management Office's (PAMO) technical capacities required for seamless collaboration in managing, monitoring, and enforcing sustainable fisheries management within the seascape, thereby improving the overall management effectiveness of TSPS. At the provincial level, the TSPS Site Management Units (SMUs), provincial governments, and inter-Local Government Unites alliances (inter-LGU alliances), the project aims to build capacity to effectively implement harmonized policies and programs, ensuring more systematic and inclusive conservation and surveillance efforts aligned with the TSPS General Management Plan that is to be renewed in 2025. At the municipal level, the project aims to improve livelihoods of especially vulnerable coastal communities through enhanced ecosystem services, financial inclusion, and gender-sensitive diversified livelihood investments. Further, the lessons learned, and best practices will be shared with national government partners such as the Department of Environment and Natural Resources (DENR) and the Department of Agriculture's Bureau of Fisheries and Aquatic Resources (DA-BFAR), as well as other municipal governments through the global Coastal 500 network.

## 2. GENERAL RESPONSIBILITIES

The CFRM consultant will work with the consortium and key-project partners (e.g. Local Government Units, Small-Management Units etc.) to identify and collate existing data (e.g. biophysical, socio-economic) that will inform the project's design. Pending outcomes, data points will either serve as baselines or inform baseline collection to be conducted during the project inception phase.

As part of the general responsibilities, the consultant shall:

- *Conduct primary and secondary data gathering of relevant baseline information, studies, and assessments related to the coastal fisheries and resource management of Tanon Strait Protected Seascape (TSPS). Please refer to the scope of work for more details.*

- *On site, conduct consultations and interviews with the DENR Protected Area Management Office (PAMO), Site Management Units (SMUs), provincial governments, community fisheries councils, local governments, and other relevant agencies and partners to collect data and information;*
- *Work with Rare and its partners, through in-person and online meetings as well as email exchanges;*
- *Develop a reporting and feedback tool that will regularly inform Rare of the progress of the consultancy;*
- *Identify stakeholders involved in commercial fishing and describe relevant socio-economic dynamics and risks related to commercial fishing activities within the TSPS*
- *Based on aforementioned work, support the project team in the development of relevant sections in the Blue Action Fund proposal format and logframe indicators.*

### 3. SCOPE OF WORK

The consultant will work with Rare’s Philippines team and the Global Development Team who will collect and analyze baseline information and assessment studies relevant to the development of the full proposal. This includes but is not limited to the TSPS management status, ecological/biophysical profile, socio-economic profile, harvesting practice, coastal law enforcement, sustainable livelihoods, and supply chain management. This task will include at least one field visit to conduct consultation and validation workshops in each of the target Site Management Units<sup>1</sup> as well as additional visits to the DENR TSPS Protected Area Management Office (PAMO) and other relevant partners as needed. The consultant would also conduct a TSPS-wide METT assessment (or use an equivalent instrument) to update the 2019 METT TSPS report. The consultant is expected to plan and execute fieldwork in close collaboration with Rare’s teams in the Philippines.

#### **TASK 1:** *Workplan development & approach*

**Deliverable:** detailed Workplan (incl. Gantt chart specifying deliverables and deadlines for drafts as well as final versions) and short description of planned approach.

- **Activity 1.1:** In coordination with Rare, establish a workplan with detailed timeline and deliverables that considers possible disruptions or delays. Define planned approach (e.g. field visits, methods and samples). The expected consultancy timeline is 3-6 months, with the fieldwork and data collection foreseen for Q3 & Q4 2024.

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<sup>1</sup> The following are the project’s target SMUs: Northeast Negros, Mideast Negros, Southeast Negros, and Northwest Cebu.

## **TASK 2:** *Orient to project, Rare and partners*

### **Deliverable: Background Research Brief on the current profile of TSPS' coastal fisheries and resource management**

- **Activity 2.1:** Review materials provided by Rare and conduct initial desktop research of the TSPS' coastal fisheries and resource management profile, including but not limited to its management status, ecological/ biophysical profile, socio-economic profile, harvesting practice, coastal law enforcement, commercial fishing, sustainable livelihoods, and supply chain management.
- **Activity 2.2:** Discuss field context with Rare and partners, and review results of already-completed preparatory fieldwork, background materials, national legislation, community engagement policies, etc. to learn the project's objectives and approaches, understand the relevant communities' and stakeholders' needs and situations, and identify information gaps that will need to be addressed.
- **Activity 2.3:** Against the background of the Blue Action Fund proposal template, present the initial findings on key gaps and opportunities with Rare project staff to help inform the project scope and respond to the [BAF full proposal document](#).

## **TASK 3:** *Collate and/ or conduct baseline assessments.*

**Deliverables:** Building on Task 2 and Rare's feedback, expand the research brief with the following:

- **Conduct TSPS-wide METT assessment report**
  - **Activity 3.1:** In close collaboration with Rare, conduct a TSPS-wide METT assessment (or an equivalent instrument), in the three provinces within the Tanon Strait (Negros Oriental, Negros Occidental, and Cebu provinces).
  - **Activity 3.2:** Analyze the results of the METT assessment and provide recommendations based on the assessment results to further strengthen the project's log-frame.
- **Collection of secondary biophysical data**
  - **Activity 3.3:** In conjunction with abovementioned tasks, collect relevant secondary biophysical data including but not limited to status of fish stocks (e.g. fish biomass), mangroves, seagrass and coral reefs, to inform the full proposal development process.
- **Collection and Analysis of secondary socio-economic data**
  - **Activity 3.4:** Consolidate available secondary data on the socio-economic profile of the TSPS (incl. data on income, poverty incidence, and Knowledge, Attitudes, and Practices [KAP] on conservation) based on results from surveys conducted by the target SMUs.
  - **Activity 3.5:** Analyze the results of surveys and provide recommendations to further strengthen the project's log frame.

**TASK 4:** *Edit and finalize sections of the full proposal template, according to Rare, partner and donor feedback.*

**Deliverable: Recommendation report based on the preliminary research and assessments conducted**

- **Activity 4.1:** Share initial and final drafts with Rare of all research, studies, and assessments conducted according to the schedule developed under task 1, and address feedback, if any.
- **Activity 4.2:** Finalize all technical reports, assessments and studies conducted for submission to Rare and the donor.
- **Activity 4.3:** Develop a recommendation report highlighting the consultant’s counsel based on the research, assessments, and studies reviewed and conducted.
- **Activity 4.3:** Conduct consultation and validation workshops with key stakeholders, present the preliminary baseline findings, gather additional information, present the project’s logframe and harvest recommendations.
- **Activity 4.4:** In close collaboration with Rare, secure endorsement letter from the DENR PAMO in support of the project.

**4. DELIVERABLES & TIMELINE**

We are seeking a 3-6-month consultancy (with possibility of extension) for completion of the necessary baseline and assessment studies and analyses, beginning upon receipt of the preparation grant provided by Blue Action Fund (likely beginning of September 2024). The consultancy will take place as part of the proposal development phase, with field work and initial drafts to be delivered by the end of 2024. There is a potential for extension into the inception phase.

The provided timeline below is preferential and meant as a guidance to applicants.

#	DELIVERABLE	TENTATIVE TIMING
1	Kick-off meeting, review of existing documentation and data, and development of detailed work plan	Within 1 week of signing the contract
2	Background Research Brief on the current profile of TSPS’ coastal fisheries and resource management	Q3 - Q4 2024
3	TSPS-wide METT assessment (or equivalent instrument) report	December 2024
4	Datasets of secondary biophysical data and key results	December 2024
5	Analysis of secondary KAP survey results	December 2024
6	Technical report, which includes recommendations based on the preliminary research and assessments conducted	January 2025
7	Consultation workshops with DENR PAMO, SMUs, inter-LGU alliances	January 2025

## **5. PROJECT BUDGET & PAYMENT SCHEDULE**

Payments shall be received within 45 days of submission of invoice. The overall amount will be based on a competitive tender. Financial proposals shall exclude anticipated travel costs, which will be determined in coordination with Rare, but must be inclusive of all applicable taxes, which are the sole responsibility of the selected contractor.

Payments will be made as follows:

- 20% upfront
- 30% after receipt of drafts
- 50% upon delivery of deliverables, after determining that Consultant has complied with all terms and conditions under this Agreement.

## **6. QUALIFICATIONS OF THE CONSULTANT**

The consultant is expected to have the following skills/knowledge/experience:

- Familiarity with the Philippines, preferentially with the Tanon Strait Protected Seascape as well as the provinces of Negros Oriental, Negros Occidental and Cebu
- Familiarity with local stakeholders and proper processes and protocols for stakeholder engagement
- Ability to confidently interact in languages commonly spoken in the target area
- Ability to conduct baseline assessments and profiling such as the Management Effectiveness Tracking Tool (METT),
- Ability to gather and collect relevant baseline information, analyze volumes of data and information, and identify information gaps and provide recommendations
- Ability to conduct consultation workshops, FGD and KII with government agencies, academic institutions, local NGOs and CSOs
- Ability to work with Rare and partner staff to understand policies and processes in place

## **7. GENERAL DATA PROTECTION REGULATION**

All documents collected and data collected are to be treated confidentially and, in the case of personal data, in accordance with the provisions of relevant data protection laws (in particular the EU General Data Protection Regulation, the Federal Data Protection Act, and privacy protections enshrined in the Philippine Civil Code) and are to be used exclusively for the evaluation. Interviews are always anonymized. No later than one year after the completion of an evaluation, the contractor shall destroy the data and documents permanently and in accordance with data protection law.

## **8. SUBMISSION OF PROPOSAL**

Should the consultant be interested in submitting a proposal for work, please send it to Kristine Ramirez ([kramirez@rare.org](mailto:kramirez@rare.org)) under the subject: Consultancy: Rare – TSPS CFRM. Applications should include:

- Explanation on how the consultant's experience is relevant to this project, describing track record of similar undertakings (max. 0.5-1 page)
- A financial proposal using Annex D
- Proposed timeline building on the table provided in section 4
- Full CV

Proposals shall be accepted until September 27, 2024.