

Attachment 1. Terms of Reference



Subnational Climate Fund (SCF)

LOT 1: Consultancy Service for Capacity Building through In-country Thematic Training Workshops, Webinars and Online Training Courses

0. INTRODUCTION

The International Union for the Conservation of Nature (IUCN) implements the Subnational Climate Fund (SCF) initiative – Technical Assistance (TA) Facility, financed by the Green Climate Fund (GCF), and leads the execution of the capacity building component. IUCN seeks a consultant firm to support the implementation of the SCF capacity building activities in 2024: i) national thematic training workshops in 4 countries, ii) thematic webinars, and iii) development of the IUCN Academy online self-paced training courses.

1. BACKGROUND

The Subnational Climate Fund (SCF) initiative (<https://www.subnational.finance/>) is a global blended finance program supported by the Green Climate Fund (GCF) that aims to create and scale up investment opportunities that contribute to climate and Sustainable Development Goals (SDGs) impacts, while mainstreaming Nature-based Solutions (NbS). The SCF initiative is implemented by its consortium members: Pegasus Capital Advisors, IUCN, Catalytic Finance Foundation and Gold Standard Foundation.

The SCF initiative has two components: i. the SCF Equity Fund (GCF ID FP152), and ii. the SCF Technical Assistance Facility (GCF ID FP151).

The SCF Equity Fund, managed by Pegasus Capital Advisors, invests in a geographically and sector-diversified portfolio of 15 to 25 mid-sized (\$5-75M in equity), scalable, commercial, and primarily greenfield projects in [42 countries](#) across Latin America and the Caribbean, the Mediterranean, Africa and Asia, with measurable climate and SDG impacts guided by the Gold Standard for Global Goals (GS4GG) portfolio certification process. The Fund invests in four key sectors: **i. sustainable energy solutions, ii. solid waste and water management, iii. sustainable agriculture, and iv. urban development solutions.**

The grant-based SCF Technical Assistance project (see [GCF Funding Proposal](#)) is overseen by IUCN as the GCF Accredited Entity, and consists of three components: **TA1. Project Preparation** (led by Catalytic Finance Foundation), **TA2. Capacity Building** (led by IUCN), **TA3. Tools and Metrics** (led by Gold Standard Foundation).

TA2. Capacity Building consists of **TA2.1 (training)** and **TA2.2 (best practices, guidelines and tools)**. The following description outlines the objectives and main target stakeholders of each activity.

Outcome TA2: Relevant stakeholders have the information and guidance needed to support the development of sound policy and incentive schemes that enable and fast-track low-carbon infrastructure projects on a subnational level, as well as to foster up-scaling and replication of investment deals.

Activity TA2.1.1: Training of **project developers** to increase understanding of safeguard requirements, ESMS requirements, SDG and NbS criteria, business viability, and other investment requirements for high-integrity, bankable project design and delivery of climate change results.

Activity TA2.1.2: Training of **public authorities** (particularly subnational actors/local authorities) to raise awareness, help identify potential projects and provide for enabling conditions for green infrastructure investments

Activity TA2.1.3: Training of **regional financial actors** to expand know how of the value chain and blended finance vehicles for large scale replication

Activity TA2.2.1: Production of **best practices, guidelines and tools** for replication and upscaling

As mentioned above, the SCF identifies three target stakeholder groups for capacity building:

Project developers: Primarily private sector entities seeking equity investments of \$5-75M USD for return-generating projects. Other actors such as local cooperatives and NGOs can also submit project proposals to the SCF, although less likely. Project identification and development could be supported by national and subnational public entities.

Public authorities: Public authorities at national and subnational levels have distinct roles in the implementation of the SCF and similar initiatives targeting private sector-led climate investments: (i) as the enabler: providing policy environment (e.g. strategic roadmaps, regulatory procedures, financial incentives, data) to accelerate private sector-led climate investments; and (ii) climate action leader: identifying, developing and implementing climate investments (e.g. PPP projects) for provision of public services and infrastructures (e.g. electricity, waste and water management).

Regional financial actors: With a focus on local/national/regional financial actors such as local and national banks, funds and other private investors (pension funds, insurance funds, family offices, private banks, philanthropies, high net worth individuals, and other institutional investors) which are willing to offer green finance products and invest in climate actions at sub-national level.

The project started on April 20, 2021. Based on the initial assessment conducted during the project inception, feedback from the three SCF regional workshops held between September 2022 and November 2023 (LATAM, Africa, Asia-Pacific), as well as interactions with project developers and GCF National Designated Authorities (NDAs), following thematic areas have been identified and prioritized for the 2024 capacity building activities under TA2.

- 1) Access to sustainable finance, enabling business environment (main target: subnational authorities, financial actors)
- 2) Maximizing NbS investment opportunities in agribusinesses (main target: project developers)
- 3) Managing ESG risks and impacts (main target: financial actors)

2. SCOPE OF WORK

Under the supervision of IUCN Business and Nature Team (B&N), and in coordination and consultation with relevant IUCN teams/regional offices, SCF consortium members and the events management service provider (RFP LOT 2), the consultant team shall be responsible for the following specific tasks as part of the component TA2. For this purpose, please read carefully the TORs of both LOT 1 and LOT 2.

All procurement of goods, materials and equipment and services, if any, shall be made in accordance with the [IUCN Policy on Procurement of Goods and Services](#).

I. Development of core thematic training workshop programs and materials

(1) Based on the draft initial concept notes developed by IUCN (Attachment 2) and additional guidance from relevant IUCN teams, develop draft core training workshop programs and materials for each of the following 3 thematic areas:

- A. Attracting nature and climate finance for subnational governments (2-day workshop)
- B. Nature-based Solutions for agri-business (1-day workshop)
- C. Managing ESG impacts and risks in nature and climate investments (1-day workshop)

The core workshop programs should propose a modularized learning structure covering the aspects outlined in the draft initial concept notes, propose additional contents where appropriate, and include a preliminary communications and outreach strategy for stakeholders.

II. Organization of training workshops in 4 countries

Organize in-country thematic training workshops in the 4 proposed SCF countries: Kenya, Morocco, Brazil and Indonesia. The workshops should be conducted in the national language of respective countries. Simultaneous interpretation services and equipment should be provided in coordination with the events management service provider (RFP LOT 2) if the training is conducted partially in a foreign language, but should be kept to a minimum extent.

Detailed activities for each workshop consist of the following:

(1) **Identify the dates and the location of the workshop** upon consultations with relevant IUCN teams and offices, and jointly develop and manage the **workshop preparation tasks timeline** with IUCN and the events management service provider (RFP LOT 2).

An indicative schedule is provided in Section 5.

The first national workshop is to be organized in Nairobi, Kenya, on the margins of the IUCN Africa Conservation Forum (24-28 June, 2024).

(2) **Develop a national workshop program and materials** by adapting the core workshop program to the national context and needs of the target country stakeholders.

The workshop format should be conducive to interactive discussions and in-country networking among participants and encourage the application of knowledge acquired in their respective institutions.

The final program and materials shall reflect recommendations and feedback from IUCN.

(3) **Develop a communications, outreach and engagement plan.** The said plan shall:

- indicate the process and criteria to identify relevant national and subnational authorities, stakeholders and networks targeted by the workshop, including a preliminary list of national and subnational stakeholders,
- facilitate their understanding on the SCF initiative and the objectives of the workshop,
- promote interests among key national stakeholders in participation to the workshop,
- facilitate registration to the workshop and confirmation of participants,
- enhance visibility of the SCF initiative and the outcomes of the workshop among SCF stakeholders as well as wider communities on sustainable finance, nature and climate actions, blended finance and impact investments.

The plan should consist of a variety of communication approaches, including networking via influential platforms, bilateral virtual meetings, and the use of social media. The plan should be finalized and carried out based on feedback from relevant IUCN teams and offices, and involve their engagement where appropriate (e.g. invitation letters, virtual briefings).

(4) **Manage pre-workshop registration of participants**, including provisions for collection and use of personal data, and submit a **list of participants** including the identification of public sector participants of the workshop on nature and climate finance for subnational governments

who will be targeted by the GCF-IUCN travel grants based on the [IUCN Travel Policy for Non-Staff](#), to enable arrangements by the events management service provider (RFP LOT 2).

- (5) **Develop and implement pre-, post- workshop and follow-up surveys** to assess the capacity needs, effectiveness of the workshop in improving knowledge and capacity of participants, and collect feedback on its learning contents, organization, and further need for capacity building. Pre-workshop survey should serve to assess knowledge levels, interests and expectations of participants, and inform the adjustment of the workshops. Post-workshop survey should be designed to assess the improvement in knowledge of participants immediately after the completion of the workshop. Follow-up surveys should be conducted within 3-6 months after the workshop (*) to assess actions taken by the participants or behavioral changes arising from the knowledge and capacity strengthened by the workshop.
(* In case the timing of the follow-up surveys fall outside of the contract period, the consultant team should deliver all necessary elements for the surveys to be undertaken by IUCN.)
- (6) **Coordinate with the events management service provider (RFP LOT 2)** to ensure arrangements for the workshop, including simultaneous interpretation services where necessary.
- (7) **Submit the workshop completion report** to IUCN within 3 weeks after the completion of the workshop.

III. Webinars

- (1) For each of the thematic areas, organize a series of webinars (e.g. 2 to 3 sets of 60-minute webinars) capturing and summarizing fundamental elements of thematic training workshops, reflecting feedback from these events. The agenda and the speakers should be agreed upon with relevant IUCN teams based on their feedback and recommendations.
- (2) The organization of the webinars should include arrangement of videoconference service, presentation materials, pre- and post- webinar information dissemination, registration of participants, and submission of video recordings on the designated platform.
- (3) Develop and implement post- webinar surveys to collect feedback on learning contents, level of satisfaction and further need for capacity building.

IV. Development of self-paced online training courses

- (1) In coordination with relevant IUCN teams, develop a draft online self-paced training course structure (equivalent to 10- to 20- hours of learning) for each of the 3 thematic areas.
- (2) The course design shall capture fundamental elements of the thematic training workshops and webinars, reflecting feedback from these events.
- (3) The course development process shall follow the policies and requirements of the IUCN Academy. The online learning platform will be provided by the IUCN Academy (<https://iucnacademy.org/>). The consultant firm is responsible for submitting the course design (e.g. strategic objectives, target audiences, module structures) and learning materials to be uploaded to the platform (copyright-cleared texts, videos, infographics, additional reading materials, knowledge refresher Q&As, references, etc.) The consultant team shall participate in meetings with the IUCN Academy team as necessary.

3. EXPECTED OUTPUTS AND DELIVERABLES

Following deliverables shall be submitted in English language unless stated otherwise.

- Core thematic training workshop programs and materials
- National thematic training workshop programs and materials (in English and in national language)
- Workshop completion reports
- Recording of thematic webinars

- List of participants of workshops and webinars
- Survey structure and results (raw data and the analysis of the results)
- Online training course modules and learning materials
- Final completion report

4. TRAVEL REQUIREMENTS

The consultant team will be required to conduct on-site national thematic training workshops in 4 SCF countries. International travel cost to and from the workshop location of maximum 3 (three) members shall be covered under this contract within the budget limitations. All travels and costs will be subject to prior written approval and submission of all necessary proof documents following [IUCN Travel Policy for Non-Staff](#).

5. INDICATIVE SCHEDULE

- Early June : Finalize core thematic training programs
- 24-28 June : Workshop in Nairobi, Kenya (IUCN Africa Conservation Forum)
- June – July : Workshop in Morocco
- August – September : Workshop in Brasilia, Brazil
- August – November : Workshop in Indonesia
- October – December : Organization of webinars
- October – December : Development of online training courses