**ToR - P4F 0789 The Beneficiaries Task Force (2022). Subcontractor for data collection and assessment services.**

1. Background

Partnerships for Forests is a UK government funded Programme that aims at increasing the value of the standing forests by supporting private sector businesses in catalysing investments in which the private sector, public sector and communities can achieve shared value from sustainable forests and sustainable land use.

P4F seeks to increase private investment in forestry and ‘reduced-deforestation’ agriculture that supports economic growth, improved livelihoods and reduced poverty. It is designed to create market-ready Forest Partnerships (FPs) with the intention of mobilising significant investment, principally from the private sector. It pairs this with support to Enabling Conditions (ECs) measures and Demand Side Measures (DSMs) to address the barriers to achieving more widespread sustainable investment in agricultural and forest-related value chains. The P4F programme has a clear objective of learning from successes and failures to inform progress.

As a result of P4F intervention, individuals directly benefit from improvements in sustainable value chains, that will ultimately affect their livelihoods positively. To evaluate this result, P4F collects and assess data on the project level considering 5 dimensions of impact (financial capital, human capital, social capital, physical capital and natural capital), in accordance with UNDP’s Sustainable Livelihoods Framework[[1]](#footnote-1). With this evidence, the P4F’s Monitoring, Evaluation and Learning (MEL) team review, assess, approve and report on the results for each direct individual, disaggregated by gender.

However, some initiatives face challenges in generating project level data necessary to report on results from P4F intervention, but also from the business itself, posing a significant obstacle to mobilize capital from impact investors also interested in socioeconomic and environmental results.

The P4F Beneficiaries task force aims at collecting and analysing direct beneficiaries’ data from selected interventions in the portfolio, that request additional support to provide evidence of benefits materialized as a result of P4F support. This evidence will be used to report on the Programme level results and must be considered eligible as established in the Programme’s results framework indicator (RFI 062 - # of beneficiaries reached).

1. Purpose

The purpose of this TOR is to procure, select and hire a subcontractor to undertake data gathering and analysis activities in multiple projects/landscapes, that will showcase P4F impact to direct beneficiaries, according to P4F methodology. This project level evidence is essential to understand the different dimensions of impact that materialised as a result of P4F intervention.

1. The Results Framework Indicator 062 – # of beneficiaries reached

The Beneficiaries’ indicator (RFI-062) is an outcome level and quantitative indicator that dialogues directly with KPIs 1 (Number of people supported to better adapt to the effects of climate change) and 4 (Number of people whose resilience has been improved) of the International Climate Finance (ICF). The RFI-062 measures the number of individuals benefiting from improved capital where there is a demonstrable contribution from P4F.

This indicator aims at measuring the number of people who have directly benefitted from P4F supported interventions but does not seek to measure qualitative changes (improvements) to people’s lives that are expected to flow from the intervention/activity. This indicator generates a whole number per project, reflecting the largest number of beneficiaries reached through P4F support, and disaggregated by the UNDP’ Sustainable Livelihoods Framework’s capital types (type of benefit received) and gender.

*Table 1 – UNDP’ Sustainable Livelihoods Framework’s capital types: description and subindicators*

|  |  |  |
| --- | --- | --- |
| ***Capital Types*** | ***Description*** | ***Subindicators*** |
| Human Capital | It represents the abilities, experience, work skills and the physical state of good health which, when combined, allow populations to engage with different strategies and fulfil their own objectives for their livelihoods. | - # of individuals who have received training- # of individuals with improved access to health or education services |
| Social Capital | It refers to the social resources, which populations will rely on when seeking their objectives relating to livelihoods (in the present study this refers specifically to local social capital, this being networks, associations, local authorities, local officials and broader population receiving program assistance). | - # of beneficiaries in the organisation with new or improved access to decision-making spaces, as a result from P4F intervention- # of beneficiaries in the organisation with improved working conditions, as a result from P4F intervention- # of people with access to a network of piers designed to improve knowledge sharing or support |
| Natural Capital | It is the term used to refer to the stocks of naturally occurring resources (soil, water, air, genetic resources, etc.) which can be used as inputs to create additional benefits, such as food chains, protection against soil or coastal erosion, and other natural resources which can support livelihoods. | - # of people benefitting from direct targeting of improved ecosystem services that are not monetised- # of people benefitting from improved access to natural capital |
| Physical Capital | This refers to the basic infrastructure and production inputs needed to support livelihoods. | - # of individuals directly affected by improvements in infrastructure supporting sustainable supply chain, as a result from P4F intervention- #of individuals directly affected by improvements in access to clean and affordable energy, as a result from P4F intervention- #of individuals directly affected by improvements in communication infrastructure or services and access to information as a result from P4F intervention |
| Financial Capital | This refers to the financial resources which populations employ to achieve their objectives regarding livelihoods. | - # of people receiving premium payments- # of people with new or additional income streams or livelihoods- # of individuals with access to additional or new credit for implementing sustainable land use and forest management practices |

Source: P4F Results Framework Indicator Reference Sheet (RFI 062).

Until the end of the Programme’s term it is expected that each FP supported by P4F submit evidence on the results achieved in this indicator. However, it is not expected that all projects necessarily report results on all types of capital presented in Table 1. This will depend on the characteristics of each P4F supported intervention and their activities. Reports on this indicator will generate a five-points polygon chart (Figure 1)

*Figure 1 – Example of Polygon chart to report on the results achieved by P4F intervention on the RFI 062 indicator*



The example from Figure 1 presents a project that reported results in financial and human capitals, reaching 72 and 103 direct beneficiaries respectively. For each of these beneficiaries, there is supporting evidence ensuring the materialisation of the benefit in accordance to RFI 062 indicator reference sheet. For reporting purposes, only the largest number verified in the 5 different capitals (maximum evidenced result) is reported, avoiding overlapping issues.

1. Scope and Deliverables

For the project list (Table 2), there will be 2 main types of effort necessary to obtain the evidence from direct beneficiaries’ impact, data analysis and data gathering:

1. **Data Analysis**

Demanded for projects that have evidence in place but need additional effort to disaggregate beneficiaries’ information according to P4F results framework indicator methodology. The subcontractor will meet (in person, or remotely) with the project officer and grantee of the initiative to assess each situation individually, planning, informing, and reporting on the best course of action to generate the analysis and report on a final number of direct beneficiaries achieved.

**Deliverables:**

- Milestone 1.A: Preliminary report with initial findings and next steps

- Milestone 1.B: Final report with evidence presented and disaggregated according to the indicator reference sheet

- Milestone 1.C: A Data Base with the evidence prepared and referenced at the report.

1. **Data Gathering**

Demanded for projects that don’t have available evidence of beneficiaries’ result, but have indication that these materialized, based on project activities and project officer’s or grantee’s account. The subcontractor will meet (in person, or remotely) with each project officers and respective grantees establishing the rationale of impact, planning assessment field trips and reporting on the best course of action to obtain the data, develop the analysis and report on a final number of direct beneficiaries achieved.

**Deliverables:**

- Milestone 2.A: Data Gathering Schedule agreed with MEL Associate, POs and Grantees

- Milestone 2.B: Preliminary report with initial findings and next steps

- Milestone 2.C: Final report with evidence presented and disaggregated according to the indicator reference sheet

Milestone 2.D: A Data Base with the evidence prepared and referenced at the report

1. Projects List

For this contract, the subcontractor will need to develop the highlighted activities with the following projects presented in table X.

*Table 2 – List of projects included under this contract*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **P4F ID** | Project Name | **Lead implementer** | **Country** | **Activity** |
| P4F-0665 | **AFR100 Phase II**: Accelerating Scale-up of Restoration in Member Countries | AFR100 Secretariat |  | Data gathering and analysis |
| P4F-0281 | **MCDI 2.0**: Enhancing resilience of community-based forest management & forest restoration in Tanzania | MCDI | Tanzania | Data gathering and analysis |
| P4F-0614 | **WCS**- Makira Landscape Conservation through Premium Cocoa Agroforestry | WCS Madagascar | Madagascar | Data gathering and analysis |
| P4F-0702 | **UGACOF** - Building a Green Coffee Supply-Chain | UCAGOF | Uganda | Data gathering and analysis |
| P4F-0743 | **EWC 2.0**- a strengthened private sector-led model for the Ethiopian forest coffee value chain | GIZ | Ethiopia | Data gathering and analysis |
| P4F-0616 | **Lush**- Scaling Lush's Agroforestry Model in Northern Uganda | Alumalum | Uganda | Data gathering and analysis |

1. Timeframe and disbursements

All deliverables and activities must be finalized and delivered until the **1st of April, 2023**. All proponents must present a preliminary schedule that will be discussed with grantees and POs once the selection process finalizes. Disbursements will be divided and will occur after the successful achievement (approved by P4F’s MEL team) of the milestones presented at chapter 4, respecting the following proportions:

1. Data Analysis:

Milestone 1.A: Preliminary report with initial findings and next steps

Description: A preliminary short report highlighting the results achieved so far, including challenges and next steps

Disbursement: 30% of total contract value

- Milestone 1.B: Final report with evidence presented and disaggregated according to the indicator reference sheet

Description: A full report with presenting and discussing the results of the data gathering and disaggregating the beneficiaries’ data based on RFI 062.

Disbursement: 35% of total contract value

- Milestone 1.C: A Data Base with the evidence prepared and referenced at the report.

Description: A Data Base storing all evidence used for the reported results at Milestone 1.B and separated by project.

Disbursement: 35% of total contract value

1. Data Gathering:

- Milestone 2.A: Data Gathering Schedule agreed with MEL Associate, POs and Grantees

Description: A data gathering schedule agreed with POs and Grantees, including delaying risk assessment and mitigation

Disbursement: 20% of total contract value

- Milestone 2.B: Preliminary report with initial findings and next steps

Description: A preliminary short report highlighting the results achieved so far, including challenges and next steps

Disbursement: 30% of total contract value

- Milestone 2.C: Final report with evidence presented and disaggregated according to the indicator reference sheet

Description: A full report with presenting and discussing the results of the data gathering, and disaggregating the beneficiaries’ data based on RFI 062.

Disbursement: 25% of total contract value

- Milestone 2.D: A Data Base with the evidence prepared and referenced at the report

Description: A Data Base storing all evidence used for the reported results at Milestone 1.B and separated by project.

Disbursement: 25% of total contract value

In case the project list (Table2) encompasses both types of activities with projects that demand data analysis and others demanding data gathering, the contract will need to provide the deliverables of the later and consider the data gathering’s disbursements proportion. Deliverables must also include the results for the entire list of projects and not one deliverable per listed project. The total estimated contract value is GBP 131,750.

1. Expected collaboration

To be able to carry out these activities the following collaboration is expected from the different stakeholders:

*Regional P4F MEL Associate*

* Supporting coordination with Project Officers
* Making available relevant project documentation
* Being available for a validation webinar and feedback to the draft report and data gathering schedule
* Reviewing and discussing technical and financial reports

*Key staff from the main project (Grantees)*

* Support in the planning of the field work
* Being available for a half / full day workshop/interview (with key project staff/partners)
* Support in the identification of relevant project partners, beneficiaries and other relevant experts to interview
* Being available for a validation webinar and feedback to the draft report
1. Proposal Submission and Selection

Proponent organisations must submit the following documentation until the **13h of June, 2022**:

1. A list of the involved consultants, their individual resumé and previous experiences in similar scopes (3 pages max.)
2. A list of the organisation’s previous experience with the scope, highlighting past developed projects with similar scopes (2 pages max.)
3. A detailed approach showcasing how the organization intend to deliver the proposed project scope (2 pages max.)
4. A preliminary schedule, considering the final deadline in **1st of April, 2023** and including the dedication of each consultant (1 page max)
5. A detailed budget including HR, Taxes, Operational Costs, Travel costs (including taxes), not exceeding the amount of GBP 131,750 (1 page max.).

Selection criteria are presented in the Table 3 below:

Table 3 – Selection criteria and scoring.

|  |  |  |
| --- | --- | --- |
| ***Criteria*** | ***Description*** | ***Scoring*** |
| Experience in similar scope (team) | How adequate is the experience of the involved team members | 1 – No relevant experience2 – Little experience3 – Good experience4 – Excellent experience |
| Experience in similar scope (organisation) | How adequate is the experience of the organisation | 1 – No relevant experience2 – Little experience3 – Good experience4 – Excellent experience |
| Proposed approach | How adequate is the proposed approach considering the objectives and deliverables | 1 – Inadequate2 – Regular3 – Adequate4 – Excellent  |
| Schedule and budget | How adequate is the proposed schedule and budget allocation, considering local context and challenges | 1 – Inadequate2 – Regular3 – Adequate4 – Excellent  |

Questions and proposals should be sent to kidist.darsema@thepalladiumgroup.com until the 12th and 13th of June 2022 respectively. P4F reserves its right to inform proponents of cancelling the procurement at any time. Proposals received after the deadline, with an estimated budget above the established limit of GBP 131,750 or without any of the items (A to E of chapter 8), will be automatically disqualified.

1. https://www.undp.org/content/dam/rblac/docs/Research%20and%20Publications/Poverty%20Reduction/UNDP\_RBLAC\_Livelihoods%20Guidance%20Note\_EN-210July2017.pdf [↑](#footnote-ref-1)