

# Terms of References for designing and conducting a training on **fundraising for Marine Protected Areas** in the Mediterranean

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## Object of the consultancy

As part of the EU Interreg [Med MPA NETWORKS](#) project and with the support of the MAVA Foundation ([MPA/no-take project](#)), the FFEM ([COGITO project](#)), and the OFB (French Biodiversity Office), MedPAN is launching a call for the **development of a training module on fundraising for Mediterranean Marine Protected Areas (MPAs)**.

The consultancy includes **the design of a fully structured and highly operational training module and the supervision of a first training session to be held beginning 2022**. We suggest that training be developed and delivered in a **hybrid format**, partly through distance learning and partly through a face-to-face session to be held in Brijuni National Park, Croatia (subject to the evolution of the COVID pandemic) before June 2022.

*The developed training module will be integrated in the MedPAN training catalogue and will be repeated over time. The supervision of future training sessions may be conducted either by the consultant or by another trainer, but are not considered in this consultancy.*

## Supervisors of the consultancy

**MedPAN**, the network of Mediterranean Marine Protected Areas managers exists since 1990 and is led by the MedPAN organisation since 2008. The network is made of organisations that either have direct management of MPAs, or are involved in the development and management of MPAs in the Mediterranean. It counts to date 8 founding members, 63 members and 51 partners from 20 Mediterranean countries. These players manage over 110 Marine Protected Areas in 18 Mediterranean countries. The mission of MedPAN is to actively contribute to the achievement of a representative, connected, integrated and effectively managed system of Mediterranean MPAs, through a strong and active networking of MPA managers and other actors at all levels that increases knowledge and capacities of MPAs while improves awareness, MPA policy implementation and funding.

<http://medpan.org/>

**Brijuni National Park (Croatia):** The Public Institution Brijuni National Park manages the archipelago of 14 small islands in North Adriatic protected from 1983. The founder of the Public institutions is the

Government of the Republic of Croatia. The Institution is entirely self-funded, with the exception of capital expenditures and international cooperation projects. The activities of the public institution include conservation, maintenance, promotion and use of the national park in order to ensure the long term protection of biodiversity. The institution has many years of experience in various segments of nature protection, education, research, management of complex systems, financing, tourism and others. Brijuni organized and hosted many congresses, professional meetings, workshops, volunteers and children camps and few training courses in cooperation with partners. It is a member of MedPAN and planned to become one of it's training centers.

<https://www.np-brijuni.hr/en>

## Context and needs assessment

Marine Protected Areas (MPAs) are geographically defined areas, which are designated, regulated and managed to achieve specific conservation objectives. MPAs are increasingly being globally recognised as a strategic tool for the long-term conservation and protection of the marine environment, including species, habitats, ecosystems and their services, as well as to ensure sustainable management and use of marine resources.

The Mediterranean MPA system (MPAs of national status, Natura 2000 marine sites, SPAMIs<sup>1</sup> and Pelagos Sanctuary) accounts for 1,126 sites covering 8.3% of the surface of the Mediterranean Sea<sup>2</sup>. The overall MPA coverage is therefore close to the 10% protection target set for 2020 by the Convention on Biological Diversity (Aichi target 11 of the CBD also considering the OECM<sup>3</sup>). However, **strong regional disparities remain, as 97% of MPA coverage is located in EU waters** (where the Pelagos Sanctuary and the Spanish Cetaceans Migration Corridor alone account for over half of the protected area).

**Although the primary purpose of any Protected Area is nature conservation, the modalities of protection and management, regulatory standards, governance systems, are different from one MPA to another.** The six management categories and four governance types established in the IUCN Protected Area classification system<sup>4</sup> are not enough to capture the complexity of the Mediterranean

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<sup>1</sup> Through the Protocol concerning Specially Protected Areas and Biological Diversity in the Mediterranean (SPA/BD Protocol), the Contracting Parties to the Barcelona Convention established the List of Specially Protected Areas of Mediterranean Importance ([SPAMI's List](#))

<sup>2</sup> MAPAMED 2019

<sup>3</sup> OECM: Other effective area-based conservation measures

<sup>4</sup> IUCN Protected Area Categories System: <https://www.iucn.org/theme/protected-areas/about/protected-area-categories>

MPA system: In addition to Natura 2000 marine sites, SPAMIs and the Pelagos Agreement, 75 national MPA designations (e.g. national parks, nature reserves, landscape parks, etc.) refer to significantly different management and governance approaches across the 21 countries that have declared MPAs in the Mediterranean.

**The Mediterranean context is also contrasted in terms of national legal and institutional frameworks governing MPAs**, which often suffer from significant weaknesses and gaps that hamper the creation and implementation of effectively managed MPAs<sup>5</sup>. These shortcomings generally reflect a lack of clarity and integration of legal frameworks and limitations in institutional capacity, which constrain the scope for action of MPA managers, and ultimately MPA effectiveness.

Mediterranean MPAs should therefore not be considered as a homogeneous system, as MPAs differ in their specific objectives, management and governance approaches, and each country has its own legal framework, institutional structure, and agenda. **Taking into account the differences in approach between MPAs and the differences in institutional frameworks is essential to develop effective capacity building programmes that are followed by action.**

## **MPAs sustainable financing as a prerequisite for effective management**

Adequate financial resources are a prerequisite for effective management, so as to ensure that MPAs fulfil their mission of biodiversity protection and generate both ecological and social and economic benefits for local communities. However, despite increasing efforts to strengthen and develop MPAs in the Mediterranean region, MPAs remain underfunded overall.

The 2020 status of Marine Protected Areas in the Mediterranean<sup>6</sup> thus establishes that **only 11% of the national MPAs surveyed (n=111) consider their budget sufficient** to fully meet their management needs. For 30% of national MPAs the available budget is insufficient, and for 19% of them there is no budget for MPA management.

Based on the responses from the same sample, the **budget is considered secured by 18% of national MPAs**. For 31% of MPAs, a reasonable part of the budget is secured, allowing the regular functioning of the MPA, however most innovations and initiatives depend on external funding. In this sample **for 28% of the national MPAs, only a very small portion of the budget is secured** and they

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<https://portals.iucn.org/library/sites/library/files/documents/PAG-019-Fr.pdf>

<sup>5</sup> Survey on limiting factors conducted as part of the Post-2020 Mediterranean MPA Roadmap consultation process

<sup>6</sup> 2020 status of Marine Protected Areas in the Mediterranean to be published by MedPAN and SPA/RAC

could not operate adequately without external funding. Finally, **for 23% of the MPAs, the budget is not secured and management depends entirely on external and highly variable funding.**

**Although the lack of sufficient and secure financial resources is reflected at the overall regional level, the financial situation of MPAs differs significantly between EU and non-EU countries.** As the charts below show (figures 1 & 2), the few MPAs with a sufficient budget to fully meet their needs and objectives are all in EU countries. Outside the EU, none of the MPAs in the sample has a sufficient budget, and almost  $\frac{3}{4}$  of them (71%) have either no budget or an insufficient budget to meet priority management needs (compared to 45% of EU MPAs). Unsurprisingly, none of the non-EU MPAs have a secured budget (compared to 21% of EU MPAs).

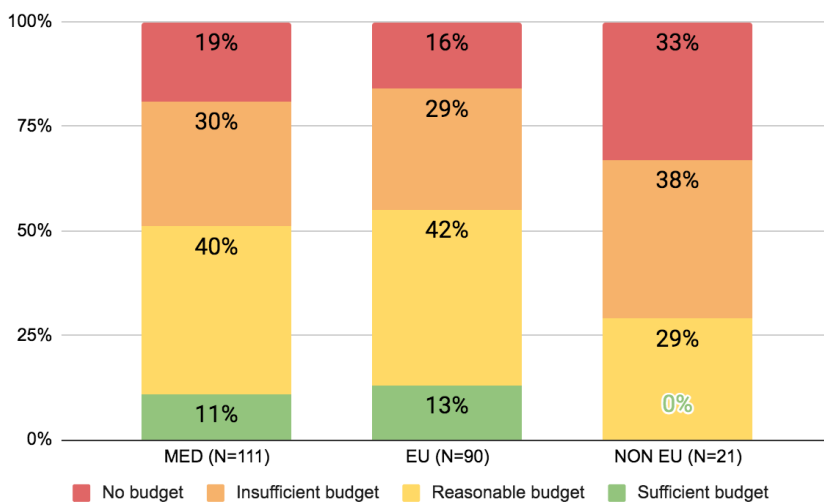


Figure 1: Budget situation in national MPAs

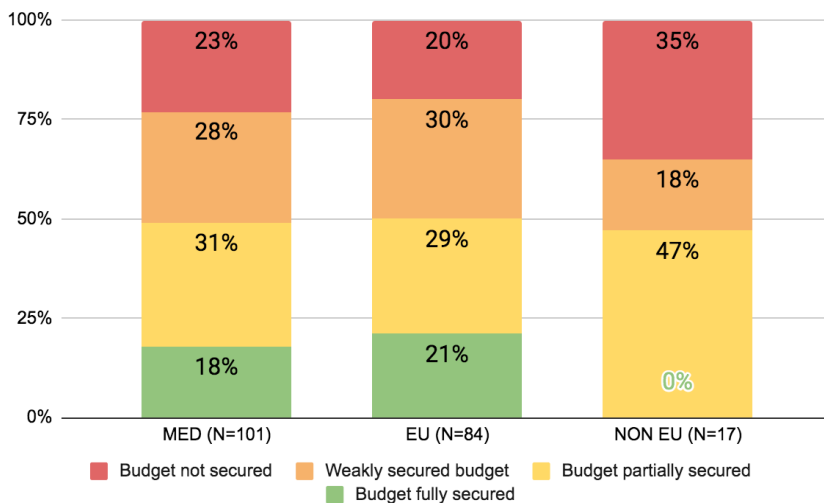


Figure 2: Budget security in national MPAs

Data collected by MedPAN in the framework of the 2020 Status of Mediterranean MPAs also highlight contrasting funding sources for EU and non-EU MPAs (figure 3). Although these trends

are measured on a small sample, they are supported by other studies and previous status reports: **National public funding is among the main funding sources for 70% of EU MPAs (compared to 10% for non-EU MPAs).** The significant contribution of national public funding thus informs the data shown above highlighting a more favourable and secure budgetary situation for the EU MPAs to meet the core objectives of their management plans. EU MPAs also have additional funding levers to generate income from self-financing (entry fees, concession fees, etc) or private partnerships, which seem not to be available in other countries. **The sources of funding for non-EU MPAs are largely dependent on international cooperation** (bilateral and multilateral agencies, foundations, trusts, investment and small grants programmes of international NGOs). The financial situation of non-EU MPAs is therefore much more fragile and volatile than that of EU MPAs, with an increased risk of donor-driven management failing to meet priority conservation objectives. It should also be noted that almost half of the MPAs in the sample (40% of EU MPAs, 50% of non-EU MPAs) indicate other sources of funding. We can cautiously hypothesise that these other sources of funding correspond to project funding that respondents were unable to categorise when answering the survey<sup>7</sup>.

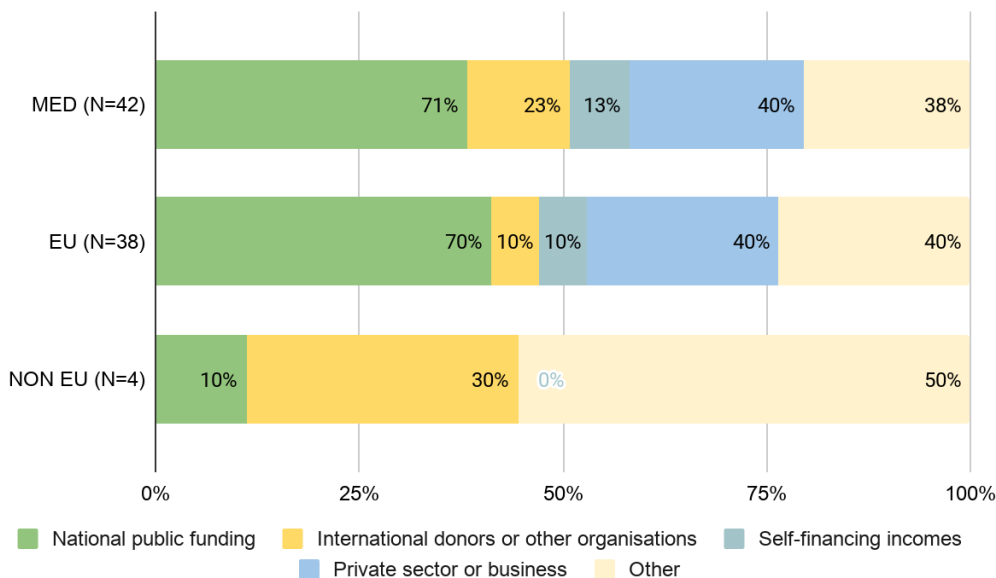


Figure 3:  
Main funding sources for MPAs

**The overall fragile financial situation of MPAs triggers a cascade of management problems that threaten MPA performance:** funds are necessary to hire and train staff, manage and monitor the MPA, work with local communities and stakeholders, invest in infrastructure and equipment, conduct surveillance patrols and enforce regulations, etc.

<sup>7</sup> As an example, during the business planning training, we observed that in the absence of a "project" category in the analysis tools used to process their financial data, managers did not intuitively categorise project funding as either national public funding or international donor funding.



The study coordinated by MedPAN, SPA/RAC and WWF Mediterranean with Vertigo Lab in 2015<sup>8</sup> shows the extent of Mediterranean MPAs' financial stakes. Based on local data on MPA funding and national data on resource mobilisation for MPAs in 17 Mediterranean countries, **the study assessed the needs and gaps in MPA funding for effective management (achievement of conservation objectives) and for the achievement of the CBD's Aichi target 11** to conserve 10% of coastal and marine areas through effectively and equitably managed, ecologically representative and well-connected systems of Marine Protected Areas by 2020. **The study estimated the financing gap between the needs of MPAs for effective management and the resources available at 700 billion euros/year to reach the 10% target by 2020.** This estimated financial gap, compared to the ambitious 30% MPA coverage target to be agreed this year at CBD COP 11 for the post-2020 Global Biodiversity Framework, shows the scale of the financial challenge in the coming years.

**National public funds are essential and must be consolidated to ensure that MPAs have secure financial resources to meet their priority management needs** (staff salaries and other operating costs, initial investment in infrastructure and equipment). As already mentioned, the funding structure of MPAs is very different in EU countries from the rest of the Mediterranean basin. EU MPAs are mostly supported by national public funds (through a significant contribution of EU funds to Member States), while non-EU MPAs are mainly dependent on international cooperation (bilateral and multilateral agencies, foundations, trusts, investment and small grants programmes of international NGOs). Despite a more favourable financial situation on the European side, Mediterranean MPA managers and stakeholders overwhelmingly consider that the **lack of dedicated long term national funds allowing budget visibility for core management costs** is the main limiting factor hindering MPAs' financial sustainability<sup>9</sup>. Shortfalls in national funding may arise from a number of different issues: it may derive from a lack of reliable information on the costs of establishing and managing MPAs, from institutional weaknesses, from a lack of national capacity to mobilise international funding, from a lack of political awareness, and ultimately a lack of political will to commit to a national MPA or even conservation strategy. On the latter point, it is essential to **promote political recognition of MPAs so that they are understood as a valuable investment with tangible ecological, social and economic benefits**. Beyond recognition, strong internal cooperation and dialogue at government level is also needed to keep MPA priorities on the political agenda and consolidate national public funding. Leverage mechanisms are needed to support the Contracting Parties to the Barcelona Convention and other relevant organisations in guaranteeing the basic funding needs of their national MPA systems. In the case of non-EU countries, Official Development Assistance (bilateral and multilateral ODA) remains a key instrument for supporting the establishment of coherent and effective national MPA systems.

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<sup>8</sup> Binet, T., Diazabakana, A., Hernandez, S. 2015. [Sustainable financing of Marine Protected Areas in the Mediterranean: a financial analysis](#). Vertigo Lab, MedPAN, RAC/SPA, WWF Mediterranean. 114 pp.

<sup>9</sup> Result from the survey on the main limiting factors hindering the achievement of MPA targets, conducted in the framework of the post-2020 Mediterranean MPA Roadmap process in October 2020 (363 responses from 21 Mediterranean countries).

In the current context of budget cuts and instability (especially in the budgets of environment ministries), **it is vital to complement traditional public funding with additional and diversified sources of funding for MPAs**, both at national and local levels, in order to ensure their financial sustainability and improve management effectiveness. Following recommendations from the 2020 Mediterranean MPA Roadmap<sup>10</sup>:

- **The development of national and local dedicated funding mechanisms needs to be explored and assessed, and legislative frameworks adapted to enable them to effectively contribute to MPA funding in the long term.** Dedicated funding mechanisms, such as special taxes, sea user fees and fines applying “polluter/payer”, “debt-for-nature”, “user/payer” or “payment for ecosystem services” concepts, and legally earmarked to support protected areas may provide significant resources for MPAs.
- **The establishment of the [MedFund](#), a custom-made conservation trust fund that aims at financing Mediterranean MPAs**, is a major achievement to contribute to the financial sustainability of MPAs. This regional mechanism is not intended to replace, but to support the necessary financial commitment of public donors. Launched by three countries (Monaco, France, Tunisia) and the Prince Albert II Foundation, The MedFund is a nonprofit Monaco based organisation that mobilises, invests and channels funds to **support day to day management of MPAs** in the Mediterranean. The Fund brings together States and civil society to lead the establishment and management of this mechanism; 6 countries and 9 regional organisations, including MedPAN, are now part of this initiative. The MedFund benefits from a global alliance of donors including AFD, GEF, FFEM, Prince Albert II Foundation and private sectors.
- **Leveraging funds for individual MPAs and national MPA systems from existing public and private donors and sourcing new donors to engage in funding biodiversity conservation in the Mediterranean** requires sustained networking efforts to:
  - **Raise donor awareness of ecosystem services and MPAs** as an effective conservation tool with demonstrated ecological, social and economic benefits.
  - **Identify and give visibility to MPA management priorities and existing or potential donor funding policies**, in order to match MPA needs with funding sources.
  - **Support improved coordination between institutional donors** to ensure complementarity and reduce competition between MPA agencies, dispersion or duplication of effort, and recurrent funding without results.

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<sup>10</sup> As a result of an extensive multi-stakeholder process coordinated by MedPAN and SPA/RAC, the [2020 Mediterranean MPA Roadmap](#) provides a set of recommendations at different levels to support the achievement of MPA objectives and boost the implementation of the CBD Aichi Target 11 / Strategic Plan for Biodiversity 2011-2020.

- **Build the capacity of MPA managers and national MPA agencies in business planning, fundraising and project management** to leverage funds from institutional donors and the business sector in line with their management objectives and financial strategy.
- **Self-financing mechanisms (or market-based mechanisms) can significantly contribute to the financial sustainability of MPAs.** With over 320 million tourists visiting the Mediterranean region every year, and the tourism industry contributing more than 340 billion Euros annually, self-financing mechanisms associated with tourism activities (e.g. visitor fees, concession fees, mooring fees, etc.) are a potentially important source of income to consider for Mediterranean MPAs. The development of ecotourism (which, with an annual growth rate of 10-15%, is one of the fastest growing sub-sectors worldwide) should be seen as an additional asset in this context, to pave the way for funding mechanisms compatible with the carrying capacity and management objectives of MPAs. However, despite a number of successful examples, the current contribution of self-financing mechanisms to MPA funding remains marginal. Building individual and institutional capacity and adapting legal frameworks is again an important issue to enable the implementation of self-financing mechanisms and their contribution to MPA sustainability and effectiveness.<sup>11</sup>

## The regular training programme of the MedPAN network

Support to MPAs capacity development is at the heart of the [strategy of the MedPAN network](#) (referring to capacity as the ability of individuals, institutions, organisations and societies to define and achieve their own development objectives).

Overall, in the Mediterranean, Marine Protected Areas are understaffed and the staff they have often lack skills and experience in management, conservation and planning. **Alongside the need to develop individual skills within MPA management teams, capacity building must also address issues of institutional capacity limitation.** Structural barriers, such as gaps in legislative frameworks governing MPAs, unclear mandates, overlapping or conflicting competences, or the lack of coordination between institutions, too often hamper MPA performance.

In 2012, WWF Mediterranean, SPA/RAC and MedPAN together with other partners developed a long-term [Regional Capacity Building Strategy for MPAs](#) that seeks to build the capacities of groups and individuals involved in planning and managing MPAs. MedPAN and other regional organisations

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<sup>11</sup> BlueSeeds (2020) Financing mechanisms: [A Guide for Mediterranean Marine Protected Areas](#). BlueSeeds, MAVA Foundation.

contribute to the implementation of this capacity building strategy, through experience sharing workshops, technical exchange visits, training, technical support to pilot sites, thematic working groups, and by publishing practical guides, video tutorials and turnkey management tools.

The regional organisations involved in this capacity building strategy cooperate on a permanent basis, notably within the MedPAN network (of which most are partners), as well as in the framework of joint projects and initiatives. This ongoing dialogue allows for the overall coherence of the capacity building activities carried out by each organisation individually as part of its own programme of action, and to avoid duplication and dispersion of effort. **Strengthening regional coordination for capacity building is however still a challenge, and a recommendation pointed out by the strategy, in particular with regard to the implementation of structured training cycles.** Scaling up an operational training programme to meet the needs of MPA practitioners on a regional scale requires enhanced coordination of partner organisations around **dedicated tools and shared processes** to identify needs at individual and institutional levels, design targeted training courses arranged in structured cycles to provide MPAs with a comprehensive learning path, foster the implementation of skills through post-training support activities, evaluate training courses and their impact, monitor beneficiaries, and raise funding opportunities to sustain the programme over time. To move forward on this challenge, MedPAN, in consultation with the network's regional partner organisations and with its members, carried out in 2018 a [feasibility study](#) for the establishment of a regular training programme for Mediterranean MPAs.

**The regular training programme of the MedPAN network is gradually being implemented since 2019 with 5 MPAs acting as training centres around the basin:** Port-Cros National Park (France), Brijuni National Park (Croatia), Gökova MPA (Turkey), the National Marine Park of Zakynthos (Greece), and in the near future the marine and coastal protected area of the Kuriat Islands (Tunisia).

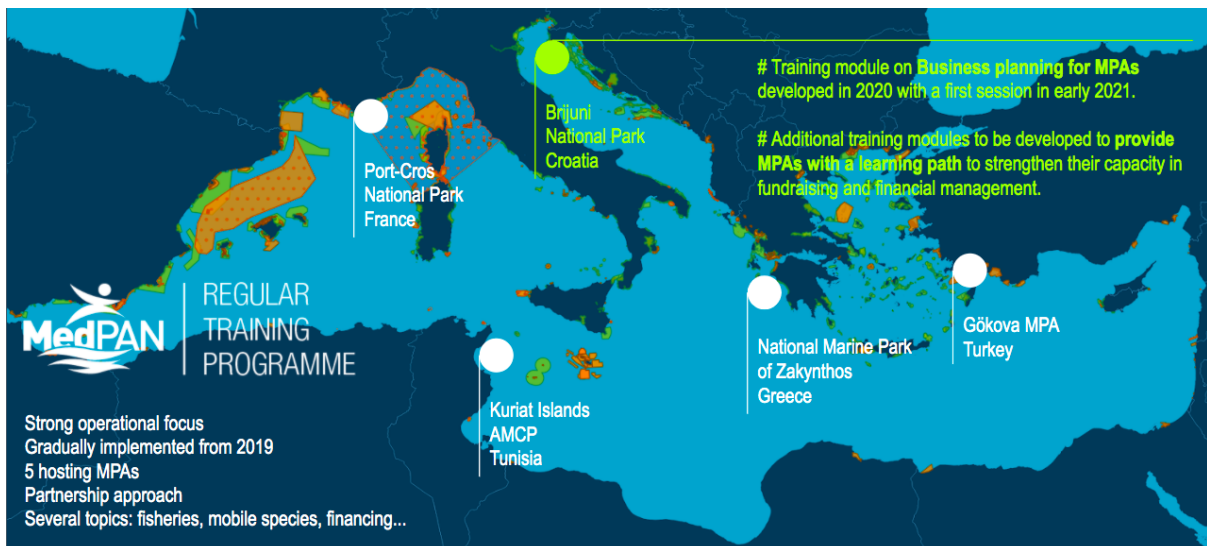
**The MedPAN secretariat has dedicated human resources to ensure the technical/pedagogical and logistical coordination of the programme, which is based on a partnership approach, aiming to integrate training developed by partner organisations into a joint training catalogue for MPAs.** A dedicated section of the new MedPAN website (currently under development) will showcase this joint training catalogue with associated resources and tools, as well as features for registering expressions of interest, collecting needs, or monitoring beneficiaries, which will serve the regional coordination.

**The training modules developed within this programme are intended to provide an operational response to the needs of MPA managers and practitioners.** This operational focus distinguishes training from other capacity building activities, which are mostly focused on sharing experiences in a peer-to-peer dynamic. Training approach and learning objectives must therefore respond to clearly identified needs, allow for practical and short-term implementation of skills acquired during training, and take into account possible implementation constraints related to the MPA context. The active involvement of MPA training centres in the development of training modules (based on their experience of the subject), and the guidance provided by MedPAN Thematic Working Groups (expert groups led by

MPA managers), ensures that training approaches are well grounded in the needs and reality of MPAs. Trainees' needs, MPA's potential constraints, and prospects for implementation are more accurately identified by questionnaires when candidates apply for training sessions, allowing to adjust the training approach to the profile of the selected trainees and MPAs.

**The regular training programme of the MedPAN network is designed in structured thematic cycles, each composed of several training modules, providing MPAs with the opportunity of a complete learning path.** In the current period, we are focusing on the development of training courses under three thematic areas (financing, fisheries, and mobile species), in the framework of the EU Interreg Med MPA NETWORKS project, and with the support of the MAVA Foundation and the FFEM, and the OFB (French Biodiversity Office). These focuses are of course not exclusive to the themes that will be covered by the programme in the future, and to which partner organisations will contribute.

**Depending on the topics and training approach required, the modules can be designed to be delivered face-to-face, online, or in a hybrid format.** One of the lessons learned from the complicated period of the COVID 19 pandemic is that we need to think outside the box for effective solutions. Some training courses must be delivered face-to-face, for example when they have a strong field or relational component. However, experience has also shown us the benefits of distance learning, allowing for autonomous learning and individualised support for trainee MPAs, with a gain in cost-effectiveness to be considered in the perspective of scaling up training to a regional level and to repeat training sessions over time.



## The financing training cycle

The training on fundraising to be developed and delivered as part of this consultancy is the second module provided in the training cycle on financing. It will complement a first training module already available on *Business planning for Mediterranean MPAs* and others to be developed in the near future by MedPAN and other regional organisations. The modules of this cycle have been identified with the support of partner organisations, training centres, and the MedPAN Financing Working Group to provide MPAs with a comprehensive learning pathway to acquire a wide range of theoretical knowledge and practical skills to meet their financing needs. **Some of these training modules, like Business planning, are common core modules, and are therefore prerequisites for more specialised modules such as the one to be developed in this consultancy.**

TRAINING CYCLE ON FINANCING		
Training module	Supervision	Date planned
Business planning for Mediterranean MPAs	MedPAN, Brijuni with support from BlueSeeds	2021 (available)
Develop a financial strategy for your MPA	TBD	TBD
Design & manage a project to protect & finance a natural area	Conservatoire du Littoral, SMILO, PIM	2021
<b>Fundraising for Mediterranean MPAs</b>	<b>MedPAN, Brijuni</b>	<b>2021-2022</b>
Plan and implement self-financing mechanisms for your MPA	BlueSeeds	2022
Community entrepreneurship for MPAs	BlueSeeds	2022
Assess and communicate your MPA ecological, socio-economic benefits and financial value	TBD	TBD

### Feedback on the training on Business planning for Mediterranean MPAs

This module developed by MedPAN and Brijuni National Park (Croatia) with the support from BlueSeeds aims to enable trainees to **understand the main concepts of business planning for MPAs** and to **autonomously use business planning tools**.

Initially planned to be delivered face-to-face, the training was **designed online** due to the circumstances of the pandemic. A first session was held early 2021 over a 4-week period for 9 Mediterranean MPAs (Egypt, Lebanon, Turkey, Croatia, Slovenia, Italy), whose applications were selected based on a questionnaire aimed at clarifying their needs, assessing the prospects for implementing the training outcomes, and checking a number of prerequisites (e.g. spreadsheet skills, access to MPA financial data). **For each MPA, a manager**

and a financial officer were trained in pairs, so as to ensure proper alignment of approaches and skills within the team and optimise implementation prospects.

The training alternates between self-learning through 5 online video tutorials focusing on theoretical aspects, and 4 practical sessions where the MPAs work bilaterally with the trainers to develop their business plan from their own financial data using the [MedPlan tool](#). An opening and closing session with all participants allows them to share their needs and expectations and their results and feedback from the training.

Feedback from trainers and trainees emphasises the effectiveness of this distance learning approach, alternating self-learning with bilateral hands-on sessions. For this training that does not require field exercises or physical interaction between participants, the added value of distance learning is twofold: by optimising the training schedule, it encourages the participation of appropriate profiles (in this case, a manager and a financial manager trained in pairs), who are sometimes difficult to involve over several days abroad. Furthermore, the combination of autonomous work (self-learning with video tutorials and homework) and bilateral practical sessions with the trainers allowed for a much more individualised delivery of the training, leading to more concrete and achieved results than would have been possible in classroom sessions.

Video tutorials: [[1 Funding needs](#)] [[2 Business Planning](#)] [[3 Optimise costs and revenues](#)] [[4 Choosing financing mechanism](#)] [[5 Self financing mechanisms](#)]

## Specifications of the training on Fundraising for Mediterranean MPAs

The purpose of these specifications is to outline the training to be developed. They define the main characteristics of the training, leaving open questions that candidates should try to answer in the methodological proposal that will accompany their offer. **Applicants' expertise will be particularly expected on the scope of the training, as well as on the definition of its learning objectives.**

### Scope of the training

Fundraising for MPAs may be directed at different categories of donors, involving a wide range of approaches and techniques, beyond which each donor has its own processes and requirements in terms of targets, application, co-funding, reporting, etc.

We distinguish two main categories of fundraising that the training should cover:



- **Institutional fundraising** from institutional donors with a mandate to provide grants for conservation or related projects, which comprises trusts, foundations and grant-giving NGOs, bilateral agencies (national government funding schemes) and multilateral agencies (funding schemes by multiple countries working together).<sup>12</sup>
- **Corporate fundraising**, such as corporate sponsorship, philanthropic giving, and other mechanisms to raise funds from the business sector, from companies either wishing to fund initiatives directly related to their core business or wishing to engage in corporate environmental responsibility practice on issues they consider important.

It is certainly not possible to cover the whole spectrum of fundraising in one training session. **However, we would like the training module to be structured to cover the different fundraising approaches and techniques as comprehensively as possible, and to be flexible enough to allow each session to focus more specifically on certain ones according to the needs and profiles of the participants.**

The organisations targeted by this training are primarily MPA management bodies wishing to raise funds for their actions, investments or specific projects. But the training will also be open to national and local authorities or agencies responsible for MPAs wishing to leverage resources for the management and strengthening of their MPA system, or to NGOs co-managing MPAs or wishing to fund a programme for MPAs. **Depending on their profile, the organisations trained will not target the same categories of donors.** For example, resource mobilisation from major multilateral donors such as the GEF is usually undertaken at government level, and seems beyond the reach of a local management body.

**We do not wish at this stage to restrict the scope of the categories of donors that should be covered by the training, but we invite applicants to express their views on this issue in the methodological proposal to be submitted with their application.** The example of the GEF is cited above deliberately, to raise the question of the relevance of considering certain mechanisms involving high-level governmental negotiation, or whose processes are too specific to be addressed in this training.

In order to refine the scope of fundraising available to MPAs and help organisations target donors whose criteria match their needs and profile, **a directory of donors for conservation in the Mediterranean will be compiled in the early phase of this consultancy** with the support of MedPAN Financing Working Group (which includes several of them, such as the MAVA Foundation, CEPF, MedFund, and WWF). This grantmakers directory will be made available to the MPA community to help organisations target donors whose criteria match their needs and profile. It will also be useful for the

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<sup>12</sup> BirdLife International (2012) [Institutional Fundraising for Conservation Projects](#), Nairobi, Kenya: BirdLife International Africa Partnership Secretariat.



consultant to make contact with some donors so as to ensure that the training approach is consistent with their requirements.

## Objectives and approach of the training

**The overall objective of the training is to provide MPA managers and practitioners with the methodologies, practical skills and turnkey tools necessary to develop an institutional or corporate fundraising strategy and to effectively raise funds to meet their needs in line with MPA conservation objectives.**

**The knowledge and skills to be acquired in this training must be identified in a comprehensive way and translated into a set of learning objectives** (i.e. *At the end of this training, trainees should be able to...*). Some learning objectives are likely to be the same for all types of fundraising (common core), while others will focus on knowledge and skills specific to certain types of fundraising (e.g. institutional fundraising or corporate fundraising) and may be emphasised or reduced from one session to the other according to the needs and expectations of participants.

**The training module will be structured around these learning objectives grouped under different components.** For each learning objective (or component grouping a series of objectives), the pedagogical approach that will be used during the training to enable the acquisition of the knowledge and skills targeted by the objective will be identified (e.g. show how to do, self-directed learning, work in subgroups, role play, learn by doing, etc).

Structuring of the module around clearly defined learning objectives and pedagogical approaches will ensure that the training is operationally oriented, i.e. that the trainees acquire all the knowledge and skills necessary for fundraising and are able to apply them immediately upon completion of the training. **For this reason also, during the training, trainees should work on their own fundraising project, based on their own data and materials.**

To support the prospects for operational implementation, **turnkey tools** (e.g. spreadsheet for financial data, SWOT matrix..) **and a training manual outlining key theoretical and methodological content will be given to participants** to guide them step by step in the development and implementation of their fundraising strategy. This manual and tools are an integral part of the training package, and will be reused over time from one session to the other.

The manual and the training approach can build on existing resources listed in the annex 2, and especially on [MedPAN guide on sustainable financing](#)<sup>13</sup> and the guide recently released by Blue Seeds on [Financing mechanisms](#)<sup>14</sup>.

**Some components of the training may be addressed through distance learning, while others, requiring for example on interaction between participants, will need to be handled face-to-face** (e.g. work in subgroups, role play). We have learned from recent experiences that distance learning, when possible, can have many advantages. In addition to the possibility of mobilising the appropriate trainee profiles in an optimised training timeframe, distance learning also allows for more individualised and effective support to MPAs based on their specific needs and expectations (see above the feedback on the training on business planning). **We believe that this training can be designed in a hybrid format, combining distance learning phases with a face-to-face session.** This requires a preliminary reflection on the components that can be delivered remotely and those that should be delivered face-to-face, and on the tools and approaches to be used accordingly to meet the training objectives (e.g. remote training with video tutorials for self-learning on theoretical aspects, bilateral support for MPAs on their project, homework; and face-to-face training session, with exchanges in sub-group for cross-fertilisation, role-playing on communication aspects, etc).

As already highlighted, the situation of Mediterranean MPAs is very disparate in terms of individual and institutional capacity. A general trend is that MPAs are understaffed, and many lack internal expertise. For instance, some MPAs have a financial officer, while others do not. Some MPAs still do not have a management plan, a business plan, or a financial strategy and are not proficient in project management. **Some basic skills may be considered as prerequisites to follow this training**, which is of course not intended to train on all these aspects (especially as other dedicated training courses are gradually being set up). But in order to keep the training open to the largest audience, we suggest an inclusive approach, recalling basics on these prerequisites.

#### IMPORTANT NOTICE

The methodological proposal that candidates must include in their tender should answer the questions and requirements included in the two sections above, in particular:

- **Express the candidate's view on the scope of the training to address different categories of donors**, recalling that the training should cover both institutional and corporate fundraising. What flexibility is possible in structuring the course, what limitations might arise?

<sup>13</sup> Binet, T., Diazabakana, A., Laustriat, M., Hernandez, S. 2015. [Sustainable financing of Marine Protected Areas in the Mediterranean: a guide for MPA managers](#). Vertigo Lab, MedPAN, RAC/SPA, WWF Mediterranean. 76 pages.

<sup>14</sup> BlueSeeds (2020) [Financing mechanisms: A Guide for Mediterranean Marine Protected Areas](#). BlueSeeds, MAVA Foundation.

- **Identify the learning objectives of the training divided into components**, specifying for each objective (or set of objectives grouped in a component) the recommended pedagogical approach, the feasibility of distance or face-to-face learning, and the turnkey tools that can be provided to participants as part of the training package to support the implementation of their fundraising strategy

**A template for the response is provided below in the annex 1.** The learning objectives outlined in the methodological proposal and other elements requested will be further discussed and refined with the support of the MedPAN Financing Working Group at the beginning of the consultancy.

## Trainees profile and selection process

**The organisations targeted by this training are primarily MPA management bodies** wishing to raise funds for their actions, investments or specific projects. **But the training should also be open to national and local authorities or agencies responsible for MPAs** wishing to leverage resources for the management and strengthening of their MPA system, and to **NGOs** co-managing MPAs or wishing to fund a programme for MPAs.

Following the approach successfully tested for the business planning training, **we recommend training in pairs a manager/conservation officer and a financial officer in each organisation**, so as to ensure that the knowledge, skills and processes acquired during the training are well integrated within the team and their implementation encouraged. In the case of NGOs co-managing MPAs (with a management mandate), it is suggested for the same reason that these NGOs be trained jointly with the MPA supervisory authority.

Trainees are selected through a call for expressions of interest circulated by the MedPAN Secretariat in the form of a questionnaire. The purpose of the questionnaire is to clarify MPA needs, to identify any contextual data useful for the training, to specify the profile of the trainees with regard to possible prerequisites, and to assess the prospects for the short-term implementation of the knowledge and skills acquired during the training. Applicants are selected on the basis of these criteria by the MedPAN Secretariat and the Brijuni National Park, in association with the consultant in charge of the training.

**The overall selection process is coordinated by the MedPAN Secretariat, which is therefore in charge of the development, dissemination and compilation of the results of the call for expressions of interest and questionnaire.** The consultant in charge of the training will however be involved in the design of the questionnaire to help identify the information to be collected (needs, context, prerequisites, implementation prospects).

The number of applications received in response to the call for expressions of interest also allows us to size the need for training, which will be repeated over time, as each session is limited to a small

number of participants. **In this case, we estimate that each training session can be attended by about 15 participants trained in pairs, i.e. 7 or 8 MPAs or organisations**, so as to allow for in-depth work on their fundraising strategy.

## First training session

**The consultant in charge of developing the training module will also deliver the first session.** Subsequent sessions of this training may be conducted either by the consultant or by another trainer, but are not considered in this consultancy.

As previously mentioned, we would like to consider this training in a hybrid format. The training sessions would therefore consist of a distance learning phase and a face-to-face training phase calibrated for about 15 trainees (ie.7 or 8 MPAs or organisations):

- **The distance learning phase** can be envisaged as a combination of webinar with all participants, self-directed learning on educational materials such as video tutorials, and bilateral exchanges between the trainer and each MPA/Organisation to work individually on their fundraising project. This online phase can be planned according to a schedule that allows sufficient time for participants to assimilate the knowledge and skills covered and to move forward with their homework on their fundraising project between two bilateral exchanges with the trainer (e.g. in the case of the business planning training, the training schedule was arranged over four weeks).
- **The face-to-face training phase** should focus on those components of the training that require physical interaction between the participants and with the trainer. In the context of this fundraising training, we are thinking in particular of the relational and communication components linked to the implementation of the strategy, which probably require face-to-face interactions. The face-to-face session will take place in Brijuni National Park (Croatia) and should not exceed 3 to 4 days.

**According to their methodology, candidates are of course free to propose a different format and arrangement of the sessions.** However, we invite applicants to consider this hybrid option, which we believe has many advantages for both trainees and training organisers. In particular, we consider this option to be cost-effective with a view to repeating the training over time to meet a widespread need at the regional level. Distance learning will also allow trainees to make progress on their fundraising

project ahead of the face-to-face session, whose agenda will be optimised to fully cover components requiring a physical exchange.

#### IMPORTANT NOTICE

**Applicants may propose a provisional training agenda in their offer.** This can help to assess the timeframe in which the learning objectives and training components can be covered. However, this provisional agenda is not compulsory in the response to this call for tender, where attention will be mainly focused on the definition of the learning objectives, pedagogical approach, and proposed tools.

**The consultant will provide at a later stage a complete and detailed agenda of the training, the online phase of which could be envisaged at the end of 2021/beginning of 2022 and the face-to-face session during the first quarter of 2022 in Brijuni National Park, Croatia** (subject to the evolution of the COVID pandemic and related constraints).

**This first training session will be held in English.** Future sessions may be either in English or in French.

**The MedPAN Secretariat and the Brijuni National Park will cover the budget of the training session** (including the budget for travel of the consultant and trainees, accommodation, meals, technical equipment, etc) **and will undertake the logistical coordination and all organisational aspects.**

## Training evaluation

The MedPAN Secretariat has developed a procedure for evaluating training courses in the form of two standard questionnaires that can be seen [at the following link](#):

- **On-the-spot evaluation** (meeting of expectations): questionnaire to circulate to trainees at the end of the training, with the objective to assess their level of satisfaction and involvement, and the relevance of the training in terms of the acquisition of knowledge and skills.
- **Ex-post evaluation** (impact): questionnaire to circulate to trainees a few months after training with the objective to assess the concrete contributions, the level of transfer within their team, and the operational implementation of training achievements.

At the beginning and end of each training session, trainees are also asked to self-assess their skills against the targeted learning objectives. This helps to determine the perceived progress made on these skills throughout the training. See the self-assessment questionnaire [here](#).

**This training evaluation process is fully managed by the MedPAN Secretariat.** However, the consultant will be involved in adapting and improving the questionnaires in line with the particular objectives of this training.

## Description of the consultancy

### Mission, duration and timing

**The consultant will design and deliver a highly operational training module on fundraising for MPAs and will conduct a first training session to be held in a hybrid format, partly through distance learning and partly through a face-to-face session in Brijuni National Park, Croatia.**

The consultancy consists of two stages:

1. **A period of three months for the development of the training module to be completed no later than 22 December 2021.** From the signature of the contract, this phase will include a kick-off meeting (online), the delivery of the detailed methodology and the training package.
2. **The period of the first training session, which will take place according to a schedule to be defined with the consultant during the first half of 2022.** Following the distance learning part, the face-to-face session will be hosted over a period of 3 to 4 days in Brijuni National Park, Croatia (subject to the evolution of the COVID pandemic).

The consultancy will be considered completed once the deliverables described in the section below have been validated, the two main ones being the **fully structured training package** and the **delivery of the first training session**.

## Tasks, deliverables and deadlines

This schedule may be revised depending on the date of signature of the contract.

Period	Tasks	Deliverables and deadlines
Week of 13 Sept 2021	<p><b>Kick off meeting with MedPAN Secretariat and Brijuni National Park</b></p> <p>Building on this first exchange, the consultant will review the methodological proposal included in his offer, with refined learning objectives arranged in components, and supported by a well-defined pedagogical approach and well-identified training contents and practical tools, on which the training will be structured. The revised methodology will also include a draft training agenda.</p>	<p><b>Deliverable: Revised methodological proposal (google doc)</b></p> <p>Language: English  <b>Deadline: 22/9/2021</b></p> <p>The deliverable will be reviewed within 7 days by the MedPAN Secretariat and Brijuni National Park with the support of MedPAN Financing Working Group.</p>
22 Sept - 22 Dec 2021	<p><b>Development of the training module</b></p> <p>The consultant will deliver a fully structured training package that will include:</p> <ul style="list-style-type: none"> <li>● <b>A training manual</b> to guide trainees step by step through the entire training process and support them in developing and implementing their fundraising strategy. The manual should be structured around the training's learning objectives and recall the key theoretical and methodological contents addressed through the training.</li> <li>● <b>Powerpoint presentations and other teaching materials</b>, such as video tutorials, used in the training.</li> <li>● <b>Turnkey tools</b> that participants can use during and after the training (e.g. spreadsheet for financial data, SWOT matrix...). If appropriate, tools may include open source softwares with tutorial references for a quick start.</li> <li>● <b>A set of short tests</b> to be used during the training to check the assimilation of knowledge and skills (e.g. quizzes, MCQs, situational exercises...).</li> <li>● <b>The final detailed agenda of the training</b></li> <li>● <b>A folder with bibliographical references</b> "to go further" (if applicable).</li> </ul>	<p><b>Deliverable: Fully structured training package (shared folder with google docs, spreadsheets, and slides)</b></p> <p>Language: English  <b>Deadline: 22/12/2021</b></p> <p>The deliverable will be reviewed and approved within 15 days by the MedPAN Secretariat and Brijuni National Park.</p>

	The different items of the training package should of course be adjusted on the basis of regular exchanges with MedPAN and Brijuni during this period of development.	
Jan - May 2022	<p><b>First training session</b></p> <p>The consultant will conduct the first training session to be held in a hybrid format, partly through distance learning and partly through a face-to-face session in Brijuni National Park, Croatia.</p> <p>After the training, the consultant will deliver a short feedback report containing practical recommendations for piloting the training in its successive phases and possible ways of improvement. This guidance document will help other trainers to pilot the training module, if the consultant is not available for future sessions. This report should not include the evaluation of the training by questionnaire sent to the trainees which will be carried out by the MedPAN Secretariat.</p>	<p><a href="#">Deliverable: Feedback and recommendations for future training sessions (google doc)</a></p> <p>Language: English</p> <p><b>Deadline: 2 weeks after training completion</b></p> <p>The deliverable will be reviewed and approved within 7 days by the MedPAN Secretariat and Brijuni National Park.</p>

## Budget

The maximum budget available for this service is **15,000€**, all tax included, in total.

**The financial offer should not include the travel costs of the consultant and the trainees**, that will be covered by the organisers, as well as all communication, logistics and other organisational costs.

## Supervision of the consultancy

MedPAN is in charge of supervising the consultancy, in association with Brijuni National Park.

The consultant will work in close collaboration and on a regular basis with the MedPAN Secretariat and especially with the MPA support manager.

The deliverables will be reviewed by the MedPAN Secretariat and Brijuni National Park with the support of MedPAN Financing Working Group.

The responsibility for approving the completion of the consultancy is under the MedPAN Board of Directors.



## Consultant profile

The consultant must have a twofold skill:

1. **Expertise in protected areas financing and more specifically in fundraising applied to Protected Areas** (experience with Marine Protected Areas and in the Mediterranean will be an added value)
2. **Teaching skills**, with experience in designing and conducting professional training courses.

The consultant should be able to conduct the training in English.

## Submission of the offers

### Tender procedure

Offers must be sent to MedPAN and Brijuni National Park **no later than Sunday 5 September 2021 at midnight UTC+2** by email at [pierre.vignes@medpan.org](mailto:pierre.vignes@medpan.org), [marie.romani@medpan.org](mailto:marie.romani@medpan.org) and [martina.hervat@np-brijuni.hr](mailto:martina.hervat@np-brijuni.hr)

During the call for tenders period, MedPAN and Brijuni National Park will only answer candidates' questions by email and will share responses to all potential candidates.

The selection process and scoring system is detailed in the section below. MedPAN and Brijuni National Park will inform every candidate who submitted a tender of the final decision made in awarding the contract. The tenders' analysis report will not be sent to the candidates. MedPAN and Brijuni National Park can inform candidates of their scores upon request.

## Required documents

Applications must include:

- **The references of the applicants and the expert(s) CV(s)** in relation to:
  - their experience in protected areas financing and specifically in fundraising applied to Protected Areas (MPAs in particular);
  - and experience in designing and conducting professional training courses.
- **The proposed methodology** in line with these terms of reference, and in particular the questions and requirements outlined in the sections *Scope of the training* and *Objectives and approach of the training*. **A template for outlining learning objectives in your methodological proposal is provided below in annex 1.**
- **The consultancy timeline** (if modifications are needed compared to what is proposed in the present Terms of Reference);
- **The estimated budget of the offer, in Euros (including VAT)**, detailing the number of working days as well as the allocation of funds to the various tasks. **The financial offer should not include the travel costs of the consultant and the trainees**, that will be covered by the organisers, as well as all communication, logistics and other organisational costs.

## Selection process and scoring system

### Technical score

The technical offer will be scored out of 80 points based on the following criteria:

#### 1. General experience and technical references: 20 points

The references presented by the applicant will be judged according to their nature, their date of realisation and number.

- a) Nature, quality and number of references of the applicant, related to similar works, issued by the applicant: 15 points
  - presentation of more than 3 deliveries : 15 points
  - presentation of 2 to 3 deliveries: 10 points
  - presentation of 1 delivery: 5 points
  - no delivery : 0 point

b) Date of realisation of the three most recent references : 5 point

- less or equal to 3 years: 5 points
- more than 3 years: 0 points

## **2. Human resources and technical expertise: 30 points**

The appreciation will be done following the number of similar work that the expert(s) contributed to as well as an evaluation of the quality of this work, on two main areas of expertise:

a) Expertise in fundraising applied to protected areas: 20 points

- two or more similar works: 15 points (+5 points if 1 in the Mediterranean)
- one similar work: 10 points (+5 points if 1 in the Mediterranean)
- no similar work: 0 points

b) Expertise in designing and conducting professional training: 10 points

- two or more similar works: 10 points
- one similar work : 5 points
- no similar work: 0 points

In the case where the applicants propose more than one expert per area of expertise, the notation granted will be the average of all experts for the same area of expertise.

## **3. Methodology, organisation and planning: 30 points:**

a) Methodology to provide the requested services (up to 20 points).

b) Organization and planning (up to 10 points)

Candidates with a technical score of less than 50 points are eliminated.

## **Interviews to complete the technical score**

**Among the competitors retained, interviews will be made with the competitors with the highest scores.**

Interviews will be scored on a total of 20 points. The notation of the interviews will be based on the commitment and proposed approach in line with the objectives of the requested services.

## Final technical score

**Among the competitors**, the best technical notation is 100 points, the other notations receive points calculated on the basis of the following equation:

**Technical score = (final score of the technical offer in question/final score of the best technical offer) x 100**

## Financial score

The lowest tenderer, **amongst the ones retained** receives 100 points, the other tenderers get descending points calculated on the following equation :

**Financial score = (lowest financial offer / financial offer of the tender being considered) x 100**

## Final note and award of the contract

The final note will be obtained by the weighing of the technical notation for 80% and financial offer for 20%.

The MedPAN Board of Directors will take the final decision to award the contract to the best offer.

## Contractual provisions

The consultancy will be the subject of a contract to which these terms of reference will be attached.

The contract will be made with the MedPAN organisation (association Loi 1901 under the French law), 58 quai du port, 13002 Marseille, France.

All deliverables produced as part of this consultancy will be the property of MedPAN. MedPAN may use them in future training sessions, whether they are conducted by the consultant or by another trainer.

## Annex 1 - Template for outlining learning objectives in the methodological proposal

The overall objective of the training is to **provide MPA managers and practitioners with the methodologies, practical skills and turnkey tools necessary to develop an institutional or corporate fundraising strategy and to effectively raise funds to meet their needs in line with MPA conservation objectives.**

The knowledge and skills to be acquired in this training should be identified in a comprehensive way and translated into a set of learning objectives (i.e. *At the end of this training, trainees should be able to...*). **Learning objectives must be outlined in the methodological proposal of applicants wishing to respond to this call for tender.**

**Please use the table below to outline the learning objectives divided into components**, specifying for each objective (or set of objectives grouped in a component) the recommended pedagogical approach (e.g. show how to do, self-directed learning, work in subgroups, role play, learn by doing, etc), the feasibility of distance or face-to-face learning, and turnkey tools that can be provided to participants as part of the training package.

Component	Learning objectives <i>At the end of this training, trainees should be able to...</i>	Pedagogical approach	Turnkey tools (if any)
	1. ... 2. ... 3. ...		
	4. ... 5. ... 6. ...		
	7. ... 8. ...		
	9. ... 10. ... 11. ...		

## Annex 2 - Reference bibliography

- Binet, T., Diazabakana, A., Laustriat, M., Hernandez, S. 2015. **Sustainable financing of Marine Protected Areas in the Mediterranean: a guide for MPA managers**. Vertigo Lab, MedPAN, RAC/SPA, WWF Mediterranean. 76 pages.
- Binet, T., Diazabakana, A., Hernandez, S. 2015. **Sustainable financing of Marine Protected Areas in the Mediterranean: a financial analysis**. Vertigo Lab, MedPAN, RAC/SPA, WWF Mediterranean. 114 pp.
- MedPLAN Business Planning tool - MedPAN, SPA/RAC, WWF (Owners); Vertigo Lab, BlueSeeds (Developers)
- BirdLife International (2012) Institutional Fundraising for Conservation Projects, Nairobi, Kenya: BirdLife International Africa Partnership Secretariat.
- BlueSeeds (2020) Financing mechanisms: A Guide for Mediterranean Marine Protected Areas. BlueSeeds, MAVA Foundation.
- A Comprehensive Overview of Global Biodiversity Finance - Final report, April, 2020 Prepared by the Organisation for Economic Cooperation and Development (OECD)
- Nonprofit Fundraising Essentials - Embrace Entrepreneurial And Strategic Approaches To Fundraise More Effectively
- Financer la protection de la biodiversité marine - Pistes d'actions pour Natura 2000 en mer - This 8-page publication, produced within the framework of the Life Marha project, provides an inventory of existing or experimental funding mechanisms.
- Fundraising Strategies For Environmental Funds. RedLAC capacity building project for environmental funds/ Paqueta Bath – Rio de Janeiro: RedLAC, 2011.
- Paying for MPAs: Examples of Large-Scale Fundraising for Planning and Management (MPA News - Vol. 13, No. 6 May / June 2012)
- Di Carlo G., Lopez A., Staub F., 2012. Capacity building strategy to enhance the management of MPAs in the Mediterranean Sea. Commissioned by WWF MedPO / MedPAN / UNEP/MAP/RAC/SPA. 19 pages + Annexes.