



Request for Proposals

Strengthening capacity of local communities to deliver sustainable bird-related ecotourism activities

for the project

Conserving Shorebirds through Community Engagement

Commission for Environmental Cooperation

2018

The Commission for Environmental Cooperation (CEC) is requesting proposals from prospective consultants to develop a set of resources and training to help communities near important shorebird sites deliver sustainable bird-related ecotourism activities. For a complete description of the project, including activities and related budget, please visit the CEC website at: <http://cec.org/our-work/projects/conserving-shorebirds-through-community-engagement>.

The CEC was established by the governments of Canada, Mexico and the United States through the North American Agreement on Environmental Cooperation, the environmental side agreement to NAFTA. An intergovernmental organization, the CEC brings together citizens and experts from governments, nongovernmental organizations, academia and the business sector to seek solutions to protect North America's shared environment while supporting sustainable economic development. Find out more at: www.cec.org.

Terms of Reference

A. Overview and Scope

The 2017–2018 project *Conserving Shorebirds through Community Engagement* aims to build capacity in communities along migration routes to conserve shorebird habitat and develop ecotourism linked to bird migration cycles (such as bird watching and celebratory events). Eight communities at important shorebird sites (Bay of Fundy, James Bay, Alto Golfo de California/Delta del Río Colorado, Bahía de Todos Santos, Delaware Bay, Copper River Delta, Georgia Barrier Coast and Willapa Bay) have been identified as project partners for this work.

The large flocks of shorebirds that congregate at stopover and overwintering sites are a spectacle that can attract a great number of visitors. Studies have shown that economic incentives are crucial for sustained community engagement in conservation, and that bird-related ecotourism can be a significant source of additional income for local economies.

To this end, the project is supporting the development of education and outreach material and training to improve knowledge, increase local support and strengthen the capacity of communities to deliver bird-related ecotourism activities such as bird watching, habitat conservation and celebratory events.

B. Description of Services

The Consultant shall coordinate with the CEC's Project Lead (or designated contacts) to accomplish the following:

- 1) Design a telephone interview and conduct interviews with the lead contact from each of the eight project sites to determine specific needs related to strengthening capacity to deliver sustainable bird-related ecotourism activities.
 - a. Before conducting the telephone interviews, design and send a short survey to the lead contact from each of the eight project sites to obtain information about the sites' assets and capacities to offer bird-related ecotourism activities (e.g., Who could operate the ecotourism activities? What are the main bird species that are present at the site? What other assets might attract tourists to the site?). The survey results will help inform the interviews.
- 2) Based on interview results:
 - a. Compile a selection of existing relevant, practical information and guidance (e.g., birdwatching guides and research, ecotourism guides and research, local studies on economic benefits) for delivering bird-related ecotourism activities in North America.
 - b. Develop a total of eight (one for each project site) graphic, non-technical two-page brochures on the local benefits of bird-related ecotourism (e.g., why the area is important for birds, why bird-related ecotourism is good for the local economy, and what people can do to support long-term sustainable ecotourism activities) to share with local decision-makers and stakeholders (e.g., chambers of commerce, tourism bureaus, local decision-makers and businesses, etc.). While a template may be used for the general look and feel of the brochures, the information and graphics contained in each brochure should be personalized for each of the eight project sites.
 - c. Develop a series of user-friendly, graphic, non-technical brochures to strengthen the capacity of the eight project sites to deliver bird-related ecotourism activities. Topics could include (but are not limited to) how to:
 - i. Conduct market research, target specific market segments, and understand people's motivation for participating in activities
 - ii. Ensure long-term sustainability of activities (e.g., preventing site degradation and wildlife disturbance, developing local infrastructure and local tourism operations, building political and community support, etc.)
 - iii. Improve community and organizational capacity to deliver activities (e.g., governance, logistics, sponsors, outreach, etc.)
 - iv. Integrate conservation education into activities
 - v. Collect data on the local economic and conservation benefits of activities and communicate those benefits effectively
- 3) Develop and deliver a training workshop for selected participating site leads on strategies and techniques to deliver sustainable bird-related ecotourism activities (tentatively scheduled for mid-May 2018, in or near Savannah, Georgia).

Deliverables

- 1) Survey and telephone interview guide
- 2) Survey and telephone interview results analysis and summary

- 3) Selection of practical information and guidance for delivering bird-related ecotourism activities in North America
- 4) Eight graphic, non-technical two-page brochures on the local benefits of bird-related ecotourism activities (one for each of the eight project sites)
- 5) Series of graphic, non-technical brochures to strengthen the capacity of the eight project sites to deliver bird-related ecotourism activities
- 6) Training workshop materials and lesson plan
- 7) Training workshop delivery and summary report

The Consultant will carry out the work described from contract signature to 29 June 2018. The Consultant will work in their own offices and, at the training workshop (tentatively scheduled for mid-May 2018, in or near Savannah, Georgia). The Consultant's participation in the training workshop is mandatory, at the dates chosen by the CEC. The CEC will cover all travel costs related to the Consultant's participation in the training workshop.

C. Periodic Reporting Requirements

12 March 2018	Survey and Telephone Interview Guide
26 March 2018	Survey and Telephone interview results analysis and summary
9 April 2018	<ul style="list-style-type: none"> • Selection of practical information and guidance • Draft template for the eight individualized non-technical two-page brochures on the local benefits of bird-related ecotourism activities • Educational brochures outline: Outline for the series of user-friendly, graphic, non-technical brochures to strengthen the capacity of the eight project sites to deliver bird-related ecotourism activities
30 April 2018	<ul style="list-style-type: none"> • Two complete draft series of brochures (two-pager for each of the eight project sites and educational brochures series) • Training workshop materials and lesson plan
15 June 2018	<ul style="list-style-type: none"> • Two final series of brochures (two-pager for each of the eight project sites and educational brochures series) • Training workshop summary report

Quality of Deliverables

The consultant is responsible for providing deliverables **of publishable quality** (i.e., copy-edited prior to submission) in English and/or Spanish and, when applicable, for the technical editing of the materials. The consultant will submit to the CEC Secretariat all written material (including complete drafts and final reports) in Microsoft Word and/or a graphic design format (e.g., Illustrator, InDesign), following the format of the CEC's [Report Template](#) and adhering to the precepts of the [Guidelines for CEC Documents and Information Products](#), as supplemented by the CEC's English and/or Spanish [Style Guides](#). Supporting documents for tables, figures and maps will be submitted with the report in their original file format (e.g., Excel or ArcGIS). Note that all amounts shall be presented in metric units, except for the two-pagers for the project sites in the United States. The CEC Secretariat will be responsible, when applicable, for translation, printing, publication and distribution of products from this activity.

Upon delivery by the consultant of a final version of the report or other written materials under the project, the CEC reserves the right to a 15-business day period to review the document(s), notify the consultant of any potential issues or errors, and return the document(s) to the consultant for appropriate corrections, at no extra cost. In all cases, contract payments will be withheld if products submitted to the CEC fail to fulfill the quality and formatting requirements specified above. In the event that the consultant neglects to make the required corrections or if, following corrections, a deliverable remains unsatisfactory, the document shall be edited or revised by a third party designated by the Secretariat, the cost of which shall be deducted from the consultant's fees at a rate of C\$60 per hour.

Plagiarism

Plagiarism is the act of conveying someone else's original expression or creative ideas as one's own and can be a violation of copyright law. Neither intentional nor unintentional plagiarism is acceptable to the CEC. The consultant must follow good scholarly methodology in preparing reports and deliverables under the contract, including systematic referencing in footnotes or in-sentence references, for any secondary sources, quotations, data, etc., that do not originate with the author. Sources for tables and figures reproduced from other literature must be given in a "Source" attribution immediately below the table or figure. Failure to properly reference the source of such borrowed material constitutes plagiarism and will be considered a breach of contract. For further information, see [Guidelines for CEC Documents and Information Products](#). In addition, for every written deliverable submitted, the Consultant must use iThenticate software, or an equivalent software approved by the Commission, to validate the written product in question and must forward the plagiarism review results to the CEC at the time of document submission. Contract payments will be retained if products do not fulfill these requirements.

Requirements

To be eligible for further consideration, all consultants must fulfill the following basic requirements.

The consultant, as well as all their personnel and subconsultants, must reside and be authorized to work legally in Canada, Mexico or the United States of America. If travel is required, the consultant must possess valid documentation to travel within these countries.

The Consultant must:

- Have a degree from an accredited educational institute in sustainable tourism, social enterprise or a related field, and at least five years of sustainable development experience.
- Have excellent research and writing skills, including survey and interview methods.
- Demonstrate excellent practical knowledge of design software and an ability to develop creative ideas to present complex concepts and data.
- Experience in marketing or business development for environmental, bird conservation or international organizations, and a proven ability to work in a multicultural setting are desirable.

The Consultant must be fluent in both written and spoken English or Spanish; proficiency in both languages is desirable.

The proposal should not exceed three (3) pages, exclusive of applicant resume or corporate brochures. It should include a detailed cost breakdown, including number of person/days of key and other personnel, direct and indirect costs, travel costs and applicable taxes.

Potential consultants must also submit any additional information that will assist the CEC Secretariat in the evaluation of their proposal, such as samples of previous work and letters of recommendation from previous assignments. This information is not subject to the three (3) page limit.

The consultant deemed best qualified will be selected on the basis of a competitive process, in accordance with sections 2.5-2.7 of the [CEC Consultant Services Procurement Manual](#).

The CEC Secretariat intends to use its standard milestone-based contract for these services. A sample is available upon request.

The consultant will be paid in the following manner:

- Upon signature of the contract and invoice
- Upon receipt and approval of April 30th deliverables and invoice
- Upon receipt and approval of final deliverables and invoice

Payment shall be made only for *bona fide* consultant fees and legitimate expenses incurred in accordance with the contract for professional services, and only upon receipt and documented acceptance by the Secretariat of statement(s) of account/invoice(s) from the consultant. Settlement of invoices that are acceptable for payment will normally be made 30 days from the date of receipt by the Commission.

The budget for this activity will not exceed C\$20,000 (twenty thousand Canadian dollars), including professional fees and expenses. Reimbursable expenses are detailed in the CEC standard contract, available upon request; in addition, the cost of using iThenticate or other CEC-approved software to detect plagiarism (US\$50) should also be considered.

For universities and nongovernmental organizations, note that the CEC accepts that overhead be charged for administration and other indirect costs up to 15% of the total value of the contract.

If the proposal were presented by a consultant established in Mexico, the applicable value-added tax will be 0%, in accordance with Article 29, section IV, paragraph a) of Mexico's VAT Act, as these are technical services that were engaged from abroad.

If a currency other than Canadian dollars is used, the consultant should indicate the total cost of the professional services in Canadian dollars as well as the currency of choice, for comparison purposes.

Conflict of Interest

"Conflict of interest" means, but is not limited to, a situation where a consultant's personal interest is sufficiently connected with professional duties under the contract, such that it results in a reasonable apprehension that said personal interest may influence the exercise of professional responsibilities under the contract. For example, a direct conflict of interest exists when the consultant is also a CEC government official, or is related to or closely affiliated with a CEC government official, CEC staff member or third party involved with the performance of the services.

The consultant will inform the CEC Secretariat of any circumstance that existed prior to the execution of this contract or that could manifest during the performance of this contract, which could constitute a conflict of interest. The consultant will complete and sign, on behalf of all his or her personnel, the attached *Declaration of Acceptance and Impartiality and Independence* (see Annex). The Consultant will also take note of the [CEC Consultant Services Procurement Manual](#).

Deadlines for Proposal Submission and Decision

The proposal, including all relevant attachments, must be received by the CEC Secretariat offices by **17:00 EST on 26 February 2018**. Proposals submitted after this deadline will not be considered.

Proposals must be submitted via e-mail to sheiberg@cec.org. Proposal format may be in Microsoft Word or Adobe PDF format. Once the proposal has been submitted electronically, the CEC will confirm receipt within three business days. If receipt is not confirmed by e-mail within this time, **applicants must contact the CEC**. The contact person is:

Sarah Heiberg
Ecosystems, Project Lead
Commission for Environmental Cooperation
393, rue St-Jacques Ouest, bureau 200
Montreal, QC, Canada H2Y 1N9
Tel: 514-350-4300; Fax: 514-350-4314

The CEC Secretariat intends to select the consultant and notify the applicants within a reasonable period of time following the proposal submission deadline.

ANNEX (see also Schedule D in CEC standard contract)

CONSULTANT'S DECLARATION OF ACCEPTANCE AND IMPARTIALITY AND INDEPENDENCE FOR CONTRACT

I, the undersigned,

Last Name: _____ First Name: _____

ACCEPTANCE

☐

hereby declare that I accept to serve as consultant in the subject contract.

IMPARTIALITY AND INDEPENDENCE

(If you accept to serve as a consultant, please check one of the two following boxes. The choice of which box to check will be determined after you have taken into account, inter alia, whether there exists any past or present relationship, direct or indirect, with any of the Parties to the North American Agreement on Environmental Cooperation ("NAAEC") or their Commission for Environmental Cooperation ("CEC") representatives, Secretariat staff, and/or third parties involved in the performance of this contract, whether financial, professional, familial, or of another kind and whether the nature of any such relationship is such that disclosure is called for pursuant to the criteria set out below. Any doubt should be resolved in favor of disclosure.)

☐

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, CEC Secretariat staff, and third parties involved in the performance of this contract, and intend to remain so; to the best of my knowledge, there are no facts or circumstances, past or present that need be disclosed because they are likely to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest.

OR

☐

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, Secretariat staff, and/or third parties involved in the performance of this contract, and intend to remain so; **however**, I wish to call your attention to the following facts or circumstances which I hereafter disclose because they might be of such a nature as to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest. Where facts or circumstances exist that might give rise to the latter such doubts, I may set out measures I intend to take to mitigate or eliminate any doubts regarding my impartiality and independence, and/or a possible conflict of interest. (Use separate sheet and attach.)

Date: _____

Signature: _____