TERMS OF REFERENCE
ICLEI Africa & CoM SSA

ICLEI Africa seeks to appoint an expert(s) in climate finance solutions for local-level climate change action. The service provider will be required to develop the content for a set of training modules that will assist cities and subnational governments in unlocking finance for local-level climate change solutions.

Bids due: 30 July 2021

Bids and technical queries can be sent to Lucy Lavirotte: lucy.lavirotte@iclei.org with Kirsty Griffin (Kirsty.griffin@iclei.org) in CC.

Please indicate interest to submit a bid and submit any queries by 16 July 2021, so responses to queries may be shared with all bidders by 20 July 2021.

Bids will still be accepted if interest is not indicated, but bidders must accept that they may not have received responses to questions submitted.

ICLEI Africa reserves the right not to appoint a service provider in relation to this Terms of Reference (ToR).
TERMS OF REFERENCE

This Terms of Reference (ToR) relates to developing the content for a set of climate finance training modules which will be used to inform the development of a virtual climate finance training course for the Covenant of Mayors in Sub-Saharan Africa initiative. The service provider will work closely with a course development expert (separate ToR posted concurrently and available for download here). The service provider is expected to only undertake work indicated within this ToR.

1. BACKGROUND

This Terms of Reference is for an initiative entitled the Covenant of Mayors in Sub-Saharan Africa (CoM SSA), co-funded by the European Union (EU), the Federal Ministry of Economic Cooperation and Development of Germany (BMZ), and the Spanish Agency for International Development Cooperation (AECID), of which ICLEI Africa is an implementing partner appointed by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). Started in 2015, the Covenant of Mayors in Sub-Saharan Africa is a major catalyst for local climate action in the region, with political commitment from over 230 local governments. The focus of the CoM SSA is to support local governments in moving from planning to implementation of energy access and climate change actions with a focus to unlock climate finance at the local level.

CoM SSA is the regional chapter of an international alliance of more than 10,000 cities, the Global Covenant of Mayors for Climate and Energy (GCoM). It is a partnership between city networks, development agencies and funding institutions, supporting cities in meeting the dual challenge of climate change and access to sustainable energy to achieve a low-emission, climate resilient and sustainable energy future.

As part of the work ICLEI Africa is doing with CoM SSA signatories, ICLEI Africa aims to develop a virtual climate finance training course aimed at unlocking finance for local-level climate change and energy access solutions. This course will be in a self-learning format to have a broad reach with the option of being facilitated. It will be developed in English and be translated into French during the development of the training course (the translation will be done by a different service provider). The climate finance training course aims to build the capacity of CoM SSA signatory cities and subnational governments, to understand and access climate finance that is relevant for their climate and energy access actions.
The course is expected to provide targeted participants at a minimum with the following capacities:

1) a clear understanding of what climate finance is and what the key concepts and terms are;
2) knowledge of the wide array of climate finance sources that can be mobilised from government, public and private sectors, foundations, etc. (external and internal to government);
3) knowledge of the key requirements of providers of finance (public and private) and ways to meet those requirements through the structuring of projects (e.g., acceptable legal entities such as SPVs or utilities, contracts, national government support, co-funding, blended finance structures, cost-recovery and business models, pooled project facilities, etc.);
4) fluency in the alternative options for project ownership of climate projects (mitigation and adaptation) across sectors (e.g., alternative project ownership options including local governments, utilities, PPPs, corporate entities, SMEs, NGOs, etc.); and
5) the specific unlocking actions and steps cities and subnational governments need to undertake to facilitate the development and finance of climate projects, partnering with project owners.

The aim of this course is to not only to orient government officials (and their partners) on funding for local-level climate projects, but most importantly on how to create the partnerships, business models, and structures required to actually secure both funding for project development as well financial close (i.e. finance of capital expenditures), and ongoing funds for the project’s sustainable operation.

2. AIM OF THIS ASSIGNMENT

ICLEI Africa seeks to appoint an expert in climate finance solutions / consortium of experts to develop the content for a set of climate finance training modules which will be used to inform the development of virtual climate finance training course. The climate finance training course will be targeted at subnational and national government officials working within sub-Saharan African cities, towns and regions, who may be new to this field. Thus, the content of the training modules should take this into account. The training modules’ content will be developed into a virtual on-line training course by a course development expert (separate piece of work and service provider). The expert(s) in climate finance solutions will be expected to work closely with the course development expert to ensure that the content of the course is properly packaged.

3. KEY TASKS

In order to support ICLEI Africa with developing the climate finance training course, the service provider would be expected to undertake the following:

3.1 Gap analysis of climate finance training materials

The expert in climate finance solutions will have a half-day inception meeting with ICLEI Africa to discuss the assignment and a short inception report will then be produced to outline the
methodology and estimated timelines to complete the deliverables associated with the assignment provided in this ToR.

The expert in climate finance solutions will then be expected to review and collate all the relevant and recent climate finance training material relevant for unlocking finance for local-level climate change solutions in sub-Saharan Africa (including information developed by ICLEI Africa, CoM SSA, and others). The gap analysis exercise is to ensure that the service provider is aware of the systematic challenges and leading-edge solutions for financing climate projects at the local level and builds on best practices, success stories, and the large inventory of resources and tools available, thus ensuring that the training course that is ultimately developed is relevant, does not duplicate existing work, and builds on existing work (including knowledge products, tools and guidelines developed by ICLEI Africa and CoM SSA).

**Key Deliverables:**

**Deliverable 1: Inception Meeting & Report:** The inception meeting will take the form of a half day brainstorming session to discuss the assignment in depth. The high-level inception report should include information on the methodology and estimated timelines to complete the deliverables associated with the assignment provided in this ToR. This should be in line with the proposal submitted for this piece of work;

**Deliverable 2: Gap Analysis Report:** The gap analysis report should include a clear overview of all the relevant and recent climate finance training material relevant for unlocking finance for local-level climate change and energy access projects.

**3.2 Advise on what training modules would be appropriate to include in the climate finance training course**

In consultation with ICLEI Africa and CoM SSA partners, post the development of the Gap Analysis Report (Deliverable 2), the expert in climate finance solutions should suggest topics which could be developed into training modules. Each proposed topic should be accompanied by an overview of the proposed content to be covered in the training modules. The aim of this course is to not only to orient city, subnational and national government officials (and their partners) on funding for local climate projects, but most importantly on how to create the partnerships, business models, and structures required to actually secure both funding for project development as well financial close (i.e., finance of capital expenditures) and ongoing funds for the project’s sustainable operation.

**Key Deliverables:**

**Deliverable 3: Demand Analysis and Proposed Training Module Report:** The report should indicate what the proposed training modules are and include a demand analysis substantiating the rationale for the selected topics, outlining the proposed training modules and the proposed content to be covered in each module. The Demand Analysis and Proposed Training Module Report will need to be signed off by ICLEI Africa as it will underpin and guide the module development process. It should therefore contain sufficient detail that will allow ICLEI Africa to understand the topics and rationale of each module proposed. A market sounding could be conducted with selected government officials and those working in the field of subnational climate finance.
3.3 Developing the climate finance training modules’ content

It is anticipated that this course will be in a self-learning format to have a broad reach, with the option of being facilitated. The self-learning format will ideally offer different options to the participants. They should be able to access the information in different ways to accommodate: i) internet connections and data constraints; ii) time constraints; and iii) levels of details sought. It is anticipated that the training course should be highly interactive and engaging, prioritising dialogic methodologies for capacity building and learning.

Once ICLEI Africa and the expert in climate finance solutions are in agreement on what topics should be developed into climate finance training modules, and following ICLEI Africa’s approval on the final topics proposed (Deliverable 3), the expert in climate finance solutions will meet with ICLEI Africa’s communication staff and the course development expert to discuss and agree on how (i.e. the modality) the information should be packaged for use in the virtual training course.

The course development expert will review the meeting notes developed by the course development expert that outline how the information proposed for each of the climate finance training modules should be packaged, as discussed and agreed upon during the meeting with ICLEI Africa and the course development expert.

Post this meeting, the service provider is then expected to develop the written content of each proposed module in line with the guidance provided in the meeting and in consultation with ICLEI Africa and the course development expert (anticipated to potentially be up to one meeting a week). The service provider will be expected to deliver this content in a specific format (as agreed upon with ICLEI Africa the course development experts) and templates for this will be supplied by the course development expert post the meeting referred to above. It is anticipated that these templates will include provision for the following for each module:

- Title
- Aim and objectives
- What will be learnt
- Proposed method of delivery to best communicate and teach the content of the modules (i.e. full text documents, infographics, videos, quizzes, interactive exercises (e.g. using tools to practice financial analysis), readings, case studies, mobile graphics, cartoon strips, static graphics, interactive pdfs, etc.)
- Detailed content of the module (broken into easy digestible format for the course developer)
- Assessment and reflection content
- Any other information agreed to per module in the inception meeting

It is critical that the content for each of the topics effectively communicates the benefits of the training, the key concepts and best practices underlying the training, with capacity-building materials such as case studies (success stories/failures), templates, checklists, tools, and examples of an action plan with action steps taken by stakeholders and partners.

A core mandatory module will need to establish key market practices and requirements for project development and finance, including the challenges and solutions for local-level climate and energy access projects, including aggregation solutions. At least one topic should focus on climate change adaptation approaches.
The content for each completed training module will be reviewed by ICLEI Africa and once any required edits are made, they will be approved by both ICLEI Africa and CoM SSA partners. Once approved, the final content of each training module (in the agreed format and in the templates agreed to during the meeting with ICLEI Africa and the course developer – see above) will be handed to the course development expert to be included in the virtual climate finance training course.

Once the course development expert has finalised the packaging of the information provided by the service provider into a virtual climate finance training course, the service provider will review the complete draft of the virtual training course, to verify the content. The service provider is expected to review each virtual module produced by the course development expert to ensure that the content is converted correctly into the virtual climate finance training course.

Once revisions have been made by the course development expert, the service provider will do a final review of the final online versions of the modules. In addition, the service provider should review any and all relevant supporting documents and outputs of the online climate training course.

Collaboration between the service provider, the course development expert and ICLEI Africa is expected to be high throughout the development of the modules. Each virtual module produced by the course development expert will be reviewed by the service provider to ensure that the content is converted correctly into the virtual climate finance training course. The team should therefore meet up to once a week and agree on timelines for review work.

**Key Deliverables:**

**Deliverable 4: Draft Training Course Modules.** The draft content for each of the modules should be submitted to ICLEI Africa for review and input.

**Deliverable 6: Final Training Course Modules.** The final versions of the modules should take into account all feedback made by ICLEI Africa before being signed off and handed to the course development expert by ICLEI Africa.

**Deliverable 7: Review of the virtual climate finance training course and any/all supporting documents/outputs.** The service provider will review the complete draft of the virtual training course, to verify the content. Once any revisions have been made by the course development expert, the service provider is also expected to do a final review of the final online versions of the modules.

**3.4. Co-development of a facilitator’s guideline**

As noted above, the course will be in a self-learning format to have a broad reach with the option of being facilitated. It is expected that the service provider works closely with the course development experts to co-develop a short facilitator’s guideline that will assist a facilitator in taking stakeholders through the online training modules. It should also provide supplementary and additional information for the training modules, including a glossary of key concepts and background/supporting material for the facilitator’s preparation.
Deliverable 8: Facilitators guidelines co-produced with the course development expert

4. ROLE OF ICLEI AFRICA

ICLEI Africa will be responsible for the following to support the service provider with this piece of work:
- Provide the service provider with relevant climate finance work completed by CoM SSA partners;
- Set up all meetings between ICLEI Africa and the course development expert;
- Supply relevant templates developed by the course development expert for the development of the content for the climate finance training modules;
- Review and comment on the Inception Report;
- Review and comment on the Gap Analysis Report;
- Review and comment on the Demand Analysis and Proposal Training Module Report;
- Review and comment on the draft content for each training module; and
- Review and sign off on each of the final training modules and facilitator guide.

5. SPECIFICATIONS TO QUOTE

It is estimated that service provider will deliver the work outlined above within 71 working days as follows:

| 1 day          | ● Half day kick off meeting with ICLEI Africa to establish expectations  
|               | ● High level and short inception report (Deliverable 1) |
| 6 days        | ● Gap Analysis Report (Deliverable 2)  
|               | ● Half day meeting with ICLEI Africa to present the outcome of the mapping activity |
| 10 days       | ● Demand Analysis and Proposed Training Module Report (Deliverable 3)  
|               | ● Half day meeting with ICLEI Africa to present the outcome of the demand analysis |
| 1 day         | ● Meeting with the course development expert to establish the format of the proposed modules content and meeting notes |
| 36 days       | ● Development of the climate finance training modules’ content (Deliverable 4: Draft training course modules and Deliverable 5: Final training course modules) |
| 12 days       | ● Review of virtual climate finance training course (Deliverable 7) |
| 5 days        | ● Co-development of the facilitator’s guideline (Deliverable 8) |

6. SERVICE PROVIDER REQUIREMENTS

Proposals may be submitted by an individual or a consortium with proven expertise in both climate finance and writing/communicating topics like climate finance to a diverse audience, and in particular city and subnational government officials. A consortium of experts may include an expert in climate finance solutions and a writing expert who can convert the
technical content into accessible language for the target audience. The team must meet the following requirements:

- A minimum of 5-years’ experience in the climate finance sector with a detailed working knowledge on project development and finance (including blended finance and aggregation approaches) of local-level climate projects; the types of climate finance (public and private) available to cities and subnational governments, and other project owners of local-level climate projects; and the requirements, structures, and actions required to access these finance sources.
- Demonstrated expertise, experience (minimum 3-years), knowledge, and understanding of climate change mitigation, climate change adaptation and access to energy, and how to finance both at the subnational level.
- Demonstrated knowledge (minimum 3 years) of subnational and non-sovereign finance for climate change action at the subnational level.
- Experience (minimum 3 years) developing technical content, particularly content related to climate finance.
- Excellent writing skills.
- Proven experience developing course material and training material.
- Experience (minimum 3 years) working with cities and subnational governments to package projects and access climate finance, and/ or government(s) and the private sector to unlock finance for local-level climate action.
- Deep understanding on the developments and available products in this space would be of added advantage to ensure we add value and do not replicate existing efforts.

7. EVALUATION CRITERIA

Bids will be evaluated against the following criteria:

- Price (per portion of work indicated above), including per person hourly/daily rates and number of hours/days per portion of work;
- Demonstrated Skills and Expertise, linked to those indicated in this ToR;
- Demonstrated Experience, related to this ToR;
- Interpretation of the Terms of Reference and methodology proposed; and
- A B-BBEE certificate (if applicable).

8. SUBMISSION PROCESS

Kindly submit your proposal to Lucy Lavirotte: lucy.lavirotte@iclei.org with Kirsty Griffin (Kirsty.griffin@iclei.org) in CC by 16:00 (SAST) on 30 July 2021. For any queries related to submission please contact ICLEI Africa via the email above.

Please use the subject line: ‘CoM SSA: Climate Finance Training Modules Proposal’ when submitting your proposal, and include the following information:

1) Proof of all requirements for this work as per section 6 & 7 above (pieces of work that demonstrates expertise).

2) Proposal and work plan and detailed budget in South African Rands (ZAR). Each deliverable should be unpacked to include the following information:

   a) Outline of the team working on each deliverable with time per team member allocated to each deliverable, and individual rates.

   b) Total number of hours/ days assigned to each task (per team member and total); and
c) Proposed approach and methodology.
3) Curriculum vitae of the service provider and/ or each team member of the consortium.
4) Company profile (if relevant).
5) A risk matrix and mitigation measures.
6) For South African-based service providers only, provide proof of status for preferential procurement:
   a) A B-BBEE certificate
   b) If the service provider has an annual turnover of less than R10 million and/or does not have a B-BBEE certificate, a completed and signed sworn affidavit.

9. SUBMISSION TIMELINE

- 27 May 2021: Terms of Reference released
- 30 July at 16:00 (SAST): Proposal submission closing date

ICLEI AFRICA RESERVES THE RIGHT NOT TO APPOINT A SERVICE PROVIDER IN RELATION TO THIS TERMS OF REFERENCE.

If you have not heard from ICLEI Africa by 30 September 2021, please note that either ICLEI Africa has decided not to appoint a service provider for this piece of work, or you have been unsuccessful in your application.


ICLEI - Local Governments for Sustainability (ICLEI) is a global network of more than 2,500 local and regional governments committed to sustainable urban development. Active in 125+ countries, ICLEI influences sustainability policy and drives local action for low emission, nature-based, equitable, resilient and circular development. ICLEI’s Members and team of experts work together through peer exchange, partnerships and capacity building to create systemic change for urban sustainability.