

## Support to Civil Society Organisations in Environment and Natural Resource Management in Zambia, Phase 2 (CSEF2)

### Terms of Reference for Consultant to develop a Fundraising Strategy for Kasanka Trust Limited

#### 1. Background

- 1.1 The **Support to Civil Society Organisations in Environment and Natural Resource Management in Zambia, Phase 2 (CSEF 2)** project is managed on behalf of the Ministry for Foreign Affairs of Finland by PMTC (Zambia) Ltd, in consortium with Ecorys UK.
- 1.2 The overall objective of the project is **“to enhance the role of civil society organisations (CSOs) to implement sound environmental management projects and promote sustainable and equitable development in Zambia.”**
- 1.3 The project actively seeks to identify, understand and address key capacity constraints which impede the realisation of the sector’s full potential in promoting and supporting sustainable Environment and Natural Resource Management (ENRM), and green, inclusive growth.
- 1.4 **Capacity Pathway Agreements** provide a roadmap for CSEF2 partner CSOs to implement the capacity building support received through CSEF2.

#### 2. Fundraising in CSEF 2 / Kasanka Trust Limited (KTL)

- 2.1 Supporting the long term sustainability of ENRM CSOs in Zambia is one of the cornerstones of CSEF2. Lack of resources can constrain CSO participation in the ENRM sector and affect their organisational development.
- 2.2 CSEF 2 wishes to ensure that supported CSOs have the potential to continue their organisational development and activities beyond the lifecycle of the CSEF2 grant fund, and can compete effectively for available resources.
- 2.3 KTL, like most CSO has been struggling with fund raising, implementing a largely opportunistic approach and counting on tourism revenues for its core financing. However, the availability of conservation financing worldwide is increasing, including the willingness for private enterprises to register conservation as a valid Corporate Social Responsibility (CSR), and new avenues such as biodiversity banks (for offsets) are emerging.
- 2.4 KTL wishes to develop a fundraising strategy, and test it, to structure its effort toward avenues that will deliver resources as well as define how it should organise itself internally to optimise efficiencies.

### 3. Background to Kasanka Trust Limited

- 3.1 KTL has been in existence since 1986 with biodiversity conservation as its raison d'être. The Trust has a long-running co-management agreement with Zambia's Department of National Parks and Wildlife (DNPW). KTL currently manages the Kasanka and Lavushi Manda National Parks and supports the Kafinda Game Management Area and Mpumba community area that adjoin these national parks. Management responsibility covers an area in excess of 1,800 km<sup>2</sup> with national park status and a further 4,000 km<sup>2</sup> of designated or planned community conservation area.
- 3.2 The area lies within the David Livingstone memorial zone and the Kasanka National Park is the destination of the world largest bats annual migration. These protected areas are primarily representative of the central African plateau miombo, high canopy woodland biome, but include a diverse assemblage of rivers, lakes, swamp, wet and riverine forest, dambo, grassland and high (above 1,500 m amsl) rocky ridges. Both national parks possess a diverse list of large and small animal species and a high floral diversity. The avian species diversity has been best studied of all the animal orders and the Kasanka National Park hosts the second highest bird list of all Zambia's protected areas.
- 3.3 KTL employs approximately 90 individuals allocated to law enforcement, park habitat and infrastructure management, community outreach and administration. The Trust also operates its own tourism operations in both national parks, comprising lodges, a tented camp and campsites. Revenues from tourism are ploughed back into park management and community outreach. In the next 5 years the Trust intends to significantly increase its dimension and financial sustainability and, with it, its presence and impact in the Lavushi Manda National Park.
- 3.4 The Trust's operating areas are remote. The Kasanka National Park is in Chitambo District some 120 km north-west of the town of Serenje and about 6 hours from Lusaka. The Lavushi Manda National Park is approximately 70 km south of the town of Mpika and approximately 3 hours by road from Kasanka. Rural clinics and hospitals are within a two-hour radius by road. The only educational facilities nearby are a kindergarten school at Kasanka conservation training centre. There is a bush air strip in the Kasanka National Park.
- 3.5 For its operation, the Trust relies on the revenues from tourism which are expected to grow. To expand its investment and operation, the Trust depends on grants from a variety of fund raising sources.

### 4. Overall Objective of this Assignment

- 4.1 CSEF2 requires a Consultant to facilitate the design and development of an appropriate Fundraising Strategy with and for KTL.

### 5. Specific Tasks and Deliverables

- 5.1 The specific tasks of the assignment will be to:
- develop a solid understanding of the current fund raising capacity of KTL, including its two sister trusts (UK and Netherland), analyze the current strategic angles and

approaches used by KTL to raise funds as well as review the conservation financing landscape available to KTL;

- b) carry out a critical review of the various documents that have been prepared by KTL to guide its development (e.g. 5 year strategic plan) and draft strategies or plans intended to guide fund raising;
- c) facilitate a process for KTL staff and board in the development of a Fundraising Strategy based on the conclusions of a) and b);
- d) consolidate the results of the process describe in c) in a simple, very practical and implementable strategy that describe the human resources and capacity enhancement measures that KTL must mobilize to implement the strategy (including financing), as well as include innovative but realistic fund raising new approaches, detailed steps to implement them and potential sources for such additional financing;
- e) assist the general manager in presenting the strategy to the KTL Board and sister trusts and, if necessary, incorporate comments into a final approved version;
- f) Initiate the implementation of the strategy, especially in the dimensions that are different than the current practice;
- g) Produce a short completion report with recommendations on how to optimise the implementation of the new strategy.

5.2 The four specific deliverables on this assignment will be:

- a) 2-page inception report after a) and b) above
- b) Draft Fundraising Strategy
- c) Final Fundraising Strategy after e) above
- d) Final Consultancy Report.

## 6. Proposed Location and Timing of the Assignment

6.1 The assignment will be carried out in Lusaka, though meeting with the KTL Board members, and at KTL offices in Kasanka National Park, in Chitambo District (Central Province) and at the Consultant's home office.

6.2 Pending the signing of a contract between the Consultant and the CSEF2 PMU, the assignment should commence by 20<sup>th</sup> March 2018 and will be completed no later than the 31<sup>st</sup> July, 2018.

6.3 The assignment should take a maximum of **fifteen (15)** total working days, the majority of which should be done in one phase at the KTL offices, and with KTL staff and board.

6.4 The assignment will require a minimum of one onsite visit with KTL.

## 7. Profile of the Consultant

7.1 As indicated above, the assignment may be implemented by a single consultant, a team of individual consultants, or a suitably qualified firm.

7.2 However, whatever the eventual composition of the proposed consultancy team, **it is expected that any applicant will be able to demonstrate the following key competencies and experiences** to the best of their ability:

- A University Qualification in one of the following: Marketing, Advertising, Communication, Strategic Planning; Business Administration; Project Management; Development Studies; and/or other relevant degree;
- At least five (05) years of professional experience in the implementation of fund raising and fundraising strategies;
- At least one similar professional assignment toward the development of a fundraising strategies in the field of conservation;
- Knowledge of, and experience with, the international conservation financing landscape for wildlife conservation would be an added advantage;
- Knowledge of the wildlife conservation efforts, institutions, legislations, issues, and opportunities in Zambia would be an added advantage;
- Fluent English (written and verbal).

## 8. Application Format

8.1 Applications should comprise two separate submissions:

- **Cover Letter and CV**
- **Financial Proposal.**

8.2 **The Financial Proposal** should comprise the following sections:

- A summary of the proposed gross daily fee rates for each member of the consultancy team (in Euro) inclusive of all fees, margin, statutory deductions, taxes and other charges. The summary should use the following template:

<b>Consultant</b>	<b>Gross daily fee rate (Euro) inclusive of all fees, margin, statutory deductions, taxes and other charges.</b>
1. (Insert Name as per Technical Proposal)	
2. (Insert Name as per Technical Proposal)	
3. (Insert Name as per Technical Proposal)	

- A summary of the intended level of effort for each member of the consultancy team, mapped against the defined deliverables of the assignment, utilising the following format to outline the proposed level of effort for each member of the proposed consultancy team:

Deliverable	Level of Effort/Number of Working Days <sup>1</sup>		
	Expert One	Expert Two (if applicable)	Expert Three (if applicable)
(i) Inception report (based on meeting with Board in Lusaka and two days at KTL HQ in the park)			
(ii) Draft Fundraising Strategy (based on the process of facilitation of the development of the Fundraising Strategy including workshop and consultations)			
(iii) Final Fundraising Strategy (based on validation meeting with KTL board and additional consultation in Lusaka and revision of the strategy by the consultant)			
(iv) Final consultancy report			
Total Per Expert			
<b>Total Level of Effort for the Assignment</b>			

8.3 The Cover Letter / CV and Financial Offer should be saved as **two separate, and clearly marked pdf files**.

## 9. Tender Appraisal

- 9.1 All applications will be appraised by two members of the CSEF2 Project Management Unit, and a representative from KTL;
- 9.2 Qualifying applications will be appraised by the PMU on behalf of the Ministry for Foreign Affairs of Finland, represented by the Embassy of Finland, Lusaka.

## 10. Application Process

- 10.1 Full applications should be submitted electronically to the CSEF2 PMU ([secretariat@csef2.org](mailto:secretariat@csef2.org)) by no later than 17:00 on Wednesday 28<sup>th</sup> February 2018 for review and appraisal.

<sup>1</sup> A full working day shall constitute eight (08) working hours.

- 10.2 Only shortlisted applicants will be contacted by the PMU.
- 10.3 The CSEF2 PMU will prepare a shortlist of consultants on the basis of the applications received, and may then elect to undertake full technical interviews of shortlisted candidates to inform the procurement appraisal and procurement decision.