



TERMS OF REFERENCE

CNF/2015/CSA-AM-016

KEY INFORMATION

Functional title	Consultant ¹ to prepare the Management Plan for Khosrov Forest State Reserve, Armenia
Duty station:	Armenia (though can consider home-based with trips to Armenia)
Duration of assignment:	1 year
Starting date:	November 15, or as soon as possible thereafter
Type of contract	Lump-sum
Level of engagement	N/A
Remuneration	Maximum €55,000 gross, negotiable according to experience and detailed scope of work, including all expenditures
Application procedure:	An Application Package fulfilling instructions provided should be sent to recruitment@caucasus-naturefund.org , citing reference number CNF/2016/AM-016
Application deadline:	COB Tbilisi, Georgia (UTC/GMT +3h) on 24 October, 2016
For additional information:	Mr. Arman Vermishyan, CNF National Coordinator Armenia, at avermishyan@caucasus-naturefund.org Mr. Joseph Alexander Smith, CNF Project Manager Consultancies, at jalexander@caucasus-naturefund.org

BACKGROUND OF CNF

The Caucasus Nature Fund (CNF) is a non-profit conservation trust fund founded in 2007 with the support and encouragement of the German Federal Ministry for Economic Cooperation and Development (BMZ) through the German Development Bank KfW, Conservation International (CI) and WWF Germany.

By providing long-term funding and management assistance to help meet the core needs for Protected Areas (PAs) in Armenia, Azerbaijan, and Georgia, CNF supports the conservation of the unique flora, fauna and ecosystems of the Caucasus for future generations, while at the same time improving the lives of local people today.

CNF's support to PAs ensures that basic needs are met through supplements to operational and personnel expenses, and that capacities are strengthened to ensure an improved management of PAs in addressing poaching, logging and other illegal activities, in monitoring flora and fauna species diversity and the health of natural ecosystems, in education of the public, and in promoting tourism and sustainable development.

¹ Any proposal from a team of consultants or registered company will also be considered.



OUTLINE OF CONSULTANCY

In recent years the Government of Armenia, supported by CNF and other donor organizations, has initiated an investment program to strengthen the financial sustainability and management effectiveness of PAs in the country. CNF currently provides co-financing support to selected PAs: Dilijan National Park, Lake Arpi National Park, Gnishik Community Managed Landscape, Zangezur PA as well as “Khosrov Forest” State Reserve (“Khosrov Forest”, or “KFSR”).

Khosrov Forest has a rich history of protection, starting from the 4th century when the area was designated with a protection status to conserve and enrich its flora and fauna both for hunting and improvement of regional climate conditions. In 1958 the area was designated as Khosrov Forest Strict Reserve. Today, Khosrov Forest State Reserve covers 23,213.5 ha, managed by the “Khosrov Forest State Non Commercial Organization” (KFSR-SNCO) under the Republic of Armenia Ministry of Nature Protection (MoNP), the authorized State body with overall responsibility for biodiversity conservation and the sustainable use of natural resources. KFSR-SNCO also manages two sanctuaries: Goravan (96 ha) and Khor Virab (50.28 ha).

In line with the Law of the Republic of Armenia on Specially Protected Natural Areas (SPNA, 2006) the designated protection status of “Khosrov Forest” as “State Reserve” is described as “an area of outstanding scientific, educational, historical, cultural, conservation and aesthetic values of international and/or national importance where natural environmental processes proceed without direct human intervention”, equal to a Strict Nature Reserve - IUCN category Ia. Accordingly, human use of the PA territory, including tourism, is strictly limited in line with adopted legal regulations. The Law on SPNA also states that PAs are managed in accordance with a formally endorsed Management Plan, regulating activities on protection, restoration, development and use of a given PA, towards ensuring the conservation of valuable biodiversity and landscapes by balancing nature protection measures with the activities aimed at strengthening social-economic conditions of the local population.

The latest Management Plan (covering the period of 2010-2014) for Khosrov Forest was developed by “Forest Scientific Experimental Center” SNCO in 2006.

In recognition of the importance of Khosrov Forest for landscape and biodiversity conservation in Armenia, CNF has provided support to this PA from 2010-2016, a support that is envisioned to continue in the coming years. In 2015, CNF cooperated with WWF Armenia in conducting a biodiversity monitoring survey of key species in order to inform relevant authorities and the general public on the effectiveness of conservation efforts. In 2015, CNF also commissioned a consultancy for the preparation of a Tourism Development Strategy (TDS) for Khosrov Forest. In 2016 CNF finalized a Desk Study to describe the baseline data for strengthening the biodiversity monitoring program for Khosrov Forest based on an integrated assessment of (i) biodiversity values; (ii) pressures, threats and impacts; and (iii) current management response to conservation values and address pressures and threats. Based on findings from this Desk Study, a long-term biodiversity monitoring program will begin in mid-October.

In recognition of the expiration of Khosrov Forest’s current Management Plan, and in response to a request received from the MoNP dated 13 January 2016, CNF intends to support the process of preparing a new Management Plan for Khosrov Forest State Reserve (KFSR-MP) for 2018-2028. CNF plans to develop the KFSR-MP 2018-2028 in partnership with the MoNP as well as other stakeholder institutions.



As a result of the consultancy, the KFSR-SNCO, the MoNP as well as CNF and other current and potential donors will receive a consolidated revised and updated KSRF-MP² that will guide future investments in strengthening the PA's capacity to effectively and efficiently manage Khosrov Forest, towards ensuring the sustainable conservation of valuable biodiversity and landscapes within the socio-economic and legislative setting of Armenia.

SCOPE OF WORK

The overall objective of CNF, and as such its contractors, is to support KFSR-SNCO in preparing the new KFSR-MP for the period 2018-2028, in line with international standards and good practice. The KFSR-MP will elaborate a ten-year Strategic Vision as well as a five-year implementable Operational and Action Plan.

The development process as well as the structure of the KFSR-MP document specifically shall follow the logic and approach used in CNF's recently established model Management Plan for Dilijan National Park (DNP), Armenia. The draft DNP-MP shall be made available to short-listed applicants for discussion during the interview with the Tender Commission, as needed. Development of the 2018-2028 KFSR-MP shall also be based on output from a comprehensive stakeholder consultation process.

The KFSR-MP shall describe in a structured and harmonized way the approaches and actions needed to fulfill the overall goal and objectives of the PA in ensuring the long-term sustainable conservation of its valuable natural resources. Specifically the KFSR-MP shall formulate the overall vision, strategic and long-term goals and medium- to short-term priorities for identified relevant management programs, based on comprehensive financial assessment and budgeting. Relevant practical activities shall be formulated in a realistic, prioritized and implementable Operational and Action Plan (OAP)³.

The specific tasks of the consultant, team of organization include:

1. Oversee, support and implement data collection and information analysis, including field- and desk research and analysis on the environmental, biodiversity, socio-economic and cultural features of KFSR and its surroundings, taking into account the national and international legislative-regulatory and institutional framework.
2. Develop the Situation Analysis for KFSR-SNCO, specifically the description of its natural environmental features, the current condition of important ecosystems and biodiversity values, pressures, threats and impacts.
3. Review the external boundaries (mostly the same as when established in 1958) of KFSR-SNCO based on a current/modern understanding of priority ecosystem and biodiversity values, pressures and threats, and develop a proposal for any changes, if and as needed.
4. Analyze the current management situation of the KFSR-SNCO, specifically the efficiency and effectiveness of performance in accordance with the 2010-2014 KFSR-MP and subsequent ad-hoc plans for 2014-2016. Specific attention shall be paid to programmatic activities related to administration, protection and conservation, monitoring and science, visitors, education and outreach, as well as financing and budgeting. Identify reasons for non-accomplishment (if any) of activities, outputs and outcomes as planned.
5. Evaluate KFSR-SNCO's current staffing, infrastructure and material resources, financial resources available and expected, human and institutional competences and capacities, and identify any gaps and/or needs.

² The MP will be posted on Khosrov's website in both languages – Armenia and English).

³ Minimum is 5 year OAP.



6. Convene stakeholder meetings, workshops and consultations, including but not necessarily limited to line Ministries, PA authorities, NGOs, communities, CBOs, academic and research institutes, private sector, and local community representatives. The number, format, thematic focus, location, participants and timing of stakeholder meetings shall be agreed with CNF during the Inception Phase. Costs related to the organization of meetings and workshops shall be incorporated in the detailed breakdown of costs provided in the Application Package.
7. Participate in relevant presentations and stakeholder consultations on the full draft KFSR-MP, the number, location, timing and participants to be agreed upon after approval by CNF of the first draft KFSR-MP.
8. Revise the first draft KFSR-MP to incorporate comments received during the stakeholder consultation process, including from CNF, the KFSR SNCO administration, the MoNP as well as other government or relevant stakeholders, and to deliver the full second draft KFSR-MP to CNF.
9. Prepare and send to “Environmental Expertise” SNCO the final draft KFSR-MP and relevant documents for environmental impact assessment (EIA).
10. Participate in the Public Hearings during Environmental Impact Assessment process.
11. Incorporate comments and suggestions from the public hearings in the final draft (if needed and complete final revision of document).
12. Deliver to CNF the final KFSR-MP.

The revised and updated KFSR-MP for 2018-2028 is envisioned to comply with the following general guidance:

- An MP that is implementable has a clear vision, was created using a participatory approach to IUCN or other relevant international and national standards and good practices, taking stock of the approach and outline of the recently completed draft DNP-MP developed by CNF, and is owned and supported by partners/stakeholders.
- An MP that ensures buy in and engagement of local communities and the local environmental society.
- An MP that critically reviews the current internal and external zoning of KFSR, and proposes improvements, if and as needed.
- An MP that elaborates on the long term (10 years) strategic planning and 5-years prioritized OAP at PA level. Specifically, the MP should contain a detailed activity schedule and budget linked to the OAP that can be used as a work plan for implementation by the KFSR-SNCO, the MoNP, CNF, other donors as well as relevant stakeholders.

Upon contracting the consultant, team or organization, the final methodology, the scope of work, division of thematic and implementation responsibilities and detailed Table of Contents (ToC) for the KFSR-MP will be agreed with CNF and the MoNP, taking into account relevant legislative regulations as stipulated by Armenian law and the endorsed DNP-MP model.

Deliverables:

The following deliverables will be submitted by the Consultant to CNF, in line with the tentative schedule of work and timetable proposed below:

- (1) **Deliverable 1 - Inception Report:** Detailed work plan including description of methodology (data collection, stakeholder consultations, etc.); proposed ToC; agreed division of responsibilities (on data collection, textual contributions) between partners (if any); proposed detailed itinerary for



missions, stakeholder consultations and workshops, based on desk study of available literature and stakeholder analysis.

- (2) **Deliverable 2 - Situation Analysis of KFSR and SWOT analysis:** Summary description of the KFSR, including but shall not necessarily be limited to (i) natural and cultural features; (ii) legislative-regulatory framework; (iii) socio-economic context, including tourism and recreation; (iv) threats to ecosystems and biodiversity; (v) zoning of the PA; (vi) review of the 2010-2014 KFSR-MP and 2010-2016 ad hoc plans and their realization; and (vii) assessment of KFSR-SNCO financing and budget. Based on the Situation Analysis, an analysis of Strengths, Weaknesses, Opportunities and Threats shall be completed.
- (3) **Deliverable 3 - Draft Vision and Overall Programs Goals:** Elaborated long-term strategic Vision for KFSR and the key Programs needed for the management of activities towards reaching the Vision. Preliminary identified Programs include “Administration”, “Protection and Conservation”, “Monitoring and Science”, “Visitors”, and “Education and Outreach”. If re-zoning is proposed, a separate Program shall be developed for its realization. For each Program the relevant goals envisioned to be reached during the validity period of the KFSR-MP shall be described.
- (4) **Deliverable 4 - Draft Programs:** Detailed Operational Action Plans for each of the identified Programs. Based on agreed goals, for each Program the OAP shall describe the strategic activities/measures to reach the goals, as well as relevant performance indicators that allow objective verification as to what extent goals have been achieved.
- (5) **Deliverable 5 - Full first draft KFSR-MP:** Compiled full KFSR-MP. Separately a PowerPoint presentation shall be delivered summarizing the content of the KFSR-MP, its vision, its Programs and their goals as well as the detailed OAPs. The finalization of the document will be an iterative process, with potentially a number of drafts required.
- (6) **Deliverable 6 - Full final draft KFSR-MP:** Revised first draft KFSR-MP based on comments received from CNF, the KFSR-SNCO and the MoNP.
- (7) **Deliverable 7 - Final KFSR-MP:** Revised second draft KFSR-MP based on comments received during the Environmental Impact Assessment.

All Deliverables shall be delivered in both the English and Armenian languages. Any costs for translations of materials relevant to work described in this ToR shall exclusively be borne by the Consultant. Outputs are to be submitted in electronic format.

Schedule of work and timetable:

The following activities and milestones apply according to the tentative time schedule:

Activities and Deliverables	Month	1	2	3	4	5	6	7	8	9	10	11	12
Inception Phase and Report													
Situation Analysis of KFSR and SWOT analysis													
Draft Vision and Overall Programs Goals													
Draft Programs													
1 st draft KFSR-MP													
Final draft KFSR-MP*													
Final KFSR-MP*													*

* Submission of the final draft and final KFSR-MP will be planned in accordance with Armenian legislative procedures, specifically the work of the “Environmental Expertise” SNCO and the convening of public hearings.

**Budget:**

For the complete and satisfactory completion of the Consultancy and tasks specified in this TOR, CNF shall pay a lump-sum of up to €55,000 (fifty-five thousand Euros), negotiable according to the qualifications and experience of the Consultant. The lump-sum shall include all fee payments, per diems, travel costs, costs for stakeholder meetings and workshops, taxes, overhead, any translations of KFSR-MP documents from English into Armenian, etc., as to be specified in a detailed breakdown of costs to be submitted as part of the application.

Mode of application:

The Applicant is requested to submit a full Application Package in the English language, including at least the following:

- Detailed Description of Approach (max. 3 pages) to deliver the outcomes sought, including an understanding of the work required, comments on the TOR (if any), description of proposed approach and methodology, main implementation activities, etc.
- CVs of any expert/s proposed.
- Proposed Work Plan, schedule of work and timetable, including missions.
- Detailed breakdown of costs, including any VAT or other applicable taxes.

KEY QUALIFICATIONS

- A university degree (BSc or MSc) or advanced professional working experience related to conservation management or related fields – biology, ecology, forestry, environmental/natural resources management, landscape management, etc.
- Organizations, not only individuals, with relevant experience in biology, ecology, forestry, environmental/natural resources management, landscape management, etc. are encouraged to apply.
- At least 10 years of relevant professional experience in Protected Area or Forest management – planning and design, operations, evaluation.
- Demonstrated hands-on experience in developing Management Plans for PAs according to international standards and good practice.
- Excellent knowledge of/fluent in English, knowledge of Armenian and/or Russian will be considered an advantage.
- Working experience in the South Caucasus, preferably in Armenia and specifically with Protected Area authorities is desirable.

ADDITIONAL INFORMATION

Any costs or expenses incurred in preparing the application are at the applicant's risk, and are not eligible for reimbursement by CNF.

The Consultant is allowed to conclude subcontracts with international and/or national experts as considered needed. If the Consultant envisions using subcontractors, then he/she shall bear full responsibility for the services they perform. The assigning of all activities to one or several subcontractors is not permissible. If subcontracts are envisioned, the Consultant shall include a description of experience and



CVs of proposed subcontractors as well as a Declaration of Intent signed by all proposed subcontractors, describing the envisioned form of cooperation, lead consultant, division of work, etc. Before issuing of a contract, the Consultant will be requested to submit a signed agreement with all subcontractors, including a description of joint and individual liability.

Awarding of the contract shall be based on an evaluation by the CNF Tender Commission, consisting of representatives of CNF. The Tender Committee shall evaluate information provided in the Application Package on: (1) knowledge and understanding of the subject of the tender; (2) evidence of relevant experiences in developing Management Plans for Protected Areas; (3) demonstrated capability to deliver against timetable; (4) financial proposal; (5) knowledge of and experiences with PA systems in the South Caucasus, specifically Armenia. The Tender Commission may interview one or more applicants to assist its evaluation process.

The Tender Commission reserves the right to cancel the procedure at any moment and not conclude any contract, without further notice to the applicants. It also reserves the right not to accept the lowest bid.

The Consultant or any of his/her subcontractors will act as an independent contractor under a Consultancy Agreement with CNF. The Consultant will not be an employee of CNF, and accordingly will be personally responsible for the payment of taxes according to relevant legislation.

Issuing of a contract with the selected Consultant will be, among others, based on the Consultant submitting a signed Declaration of Undertaking in accordance with accepted good practice of KfW.

Only short-listed candidates will be contacted.