

Terms of Reference for the 11-year External Evaluation of the Mesoamerican Reef Leadership Program

I. Background

The Mesoamerican Reef System (MAR) is the most important barrier reef in the Western Hemisphere and extends for more than 1,000 kilometers along the coasts of Mexico, Belize, Guatemala, and Honduras. It starts in the north of Quintana Roo, Mexico, skirts the coasts of Belize and Guatemala to end in the Bay Islands/Cayos Cochinos complex on the north coast of Honduras. The region is unique for the diversity it houses: sea turtles, manatees, more than 65 species of corals and more than 500 species of fish, including the whale shark. The region is characterized by edge reefs, barrier reefs, and atolls, cays, islands, coastal wetlands, reef and coastal lagoons, seagrass beds, and mangrove forests. It includes 72 officially declared Natural Protected Areas (NPA), which provide critical habitats for feeding, nesting, and breeding an exceptional diversity of flora and fauna species.

The MAR Ecoregion includes ocean habitats, coastal areas, tropical forests, and the watersheds that drain to the Caribbean. More than two million people depend on the health of these ecosystems for their livelihood and the reefs and mangroves provide enormous services such as protection from storm surge, sand deposits for beaches, and nutrient filtration. For generations, many communities have subsisted on the diversity of the natural resources in this area, and many currently subsist on economic activities such as tourism and the fishing industry -which are directly linked to the reef. However, threats such as overfishing, poor tourism practices, unregulated coastal development, pollution from land-based sources, along with global threats such as climate change, could permanently degrade the barrier's health and the communities' wealth.

To ensure the conservation of the MAR ecoregion, the Mesoamerican Reef Leadership Program (MAR Leadership) was launched in January 2010 by the Mexican Fund for the Conservation of Nature (FMCN) with the support of The Summit Foundation.¹ Since its launch, the Program has sought to strengthen the leadership capacities of a diverse group of early-to-mid-career individuals from Belize, Guatemala, Honduras, and the Mexican state of Quintana Roo. The Program has operated through cohort cycles of one year, with a varying number of members for each cohort between 10-25 Fellows from different backgrounds and sectors, such as academia, local and national governments, civil society organizations, private sector, fishing industries, and community-based organizations.

Every cohort has a thematic focus according to the conservation needs of the reef and they center on finding solutions to these. The themes of the nine cohorts have been the following:

- **2010:** Coastal development and sustainable tourism.
- **2011:** Sustainable fisheries and establishment of Marine Protected Areas.
- **2012:** Establishment of a network of multifunctional marine shelters.
- **2014:** Integrated management of solid waste.
- **2015:** Conservation and valuation of mangroves.
- **2016:** Blue economy for sustainable development.

- **2018:** Sustainable fisheries and community development.
- **2019:** Sustainable fisheries and community development.
- **2021 (currently in progress):** Strategies to improve the health and resilience of the MAR, aimed at tackling pollution by nutrients and contribute to a sustainable recovery from the impacts of COVID-19.

For the past eight cohorts, the Leaders have received in-person training by regional and international experts about their cohort and leadership skills, such as: strategic communication, negotiation and conflict resolution, personal development, team leadership, advocacy in public policy, among others. In the months in which there are no face-to-face workshops, webinars were held where leaders of all cohorts participated. Likewise, individual training and orientation were provided by the Program staff and outside experts, in response to specific needs identified for each Fellow. However due to the Covid-19 pandemic, in 2021 the first completely online cohort was launched. For 2022 and upcoming years, the objective is to go back to both presential and online dynamics as much as the conditions allow it.

II. Objective of the Program

The Mesoamerican Reef Leadership Program seeks to contribute to the long-term conservation of the MAR ecoregion by strengthening strategic capacities and leadership abilities of young conservationists in Mexico, Belize, Guatemala, and Honduras. The method to achieve this objective is by equipping a critical mass of individuals (Leaders) with the knowledge, tools, and networking opportunities they need to initiate and implement high-impact conservation projects.

III. Objectives of the evaluation

The evaluation is intended to determine the effectiveness, efficiency, relevance, sustainability and impact, of the MAR Leadership Program in advancing coastal and marine conservation in Mexico, Belize, Guatemala, and Honduras after its first 11 years of existence.

The evaluation seeks to propose adjustments to the Program's long-term strategies and objectives.

It is also intended to estimate the Program's impact on the 127 Fellows as professionals and the direct impact of their projects on the MAR's conservation.

IV. Scope and focus of the evaluation

a) Effectiveness

- i. Have activities been implemented according to the Program's objectives? If not, why?
- ii. Are the current institutional arrangements the most effective? Should the relationships between donors and FMCN for the Leadership Program change taking into consideration the future regional fund (Sureste Sostenible established by FMCN)?
- iii. Which results have been achieved? To what extent do they contribute to the development of the Program's objectives and theory of change?
- iv. How effective are the approaches and methods developed in delivering the desired results? How can they be improved?
- v. Which approaches and methods have led to the most and least successful results of the Program, both in terms of the leaders and their capacities and growth and those of the projects they have designed and developed? What attributes do the most, least, and moderately successful leader's projects have in common (design, topics, networking tools, funding)?
- vi. What recommendations can be made for more effective approaches to carry out the program considering pandemic and non-pandemic contexts?

- vii. After analyzing the most successful developed projects during the 11 years, which projects' characteristics should be looked for in the next cohorts? How are the most successful projects defined? How many projects have been incubated throughout the program?
- viii. What are the characteristics of a successful leader?
- ix. Do chosen Fellows have present institutional affiliation and/or its support? Are they part of a bigger network that could benefit from the networking capacities of the Program and regional conservation actors?

b) Efficiency

- i. Are the technical and financial resources available adequate to meet the Program's plans?
- ii. Are funds spent in accordance with project plans and follow the correct procedures?
- iii. What is the Program's organizational and operational efficiency?
- iv. Is the theory of change explicitly linked to the Program's activities in the short, medium, and long terms?
- v. Have there been any unforeseen problems in terms of resource allocation and use (technical and financial)? How well are financial resources managed?
- vi. Is the Program selecting the Fellows with the adequate capacities for leading successful conservation initiatives?
- vii. Is the Program selecting projects with the potential to generate high conservation impacts?
- viii. From an organizational (staffing) and governance perspective, does the Program have the best arrangement? Has the work of the staff assigned to the Program been appropriate?

c) Relevance

- i. Establish whether the Program design and approach are relevant to addressing the identified needs, problems, and challenges².
- ii. To what extent does the Program contribute to the strategic policies and projects of the four countries and the partners? How could relevance be improved in the future?
- iii. To what extent does the Program contribute to the Sustainable Development Goals (SDG) of the United Nations? How could relevance be improved in the future?

d) Sustainability

- i. Is the approach used likely to ensure continued results for the fellows or their projects beyond the end of the Program?
- ii. Are all Fellows involved sufficiently and effectively in the MAR Leadership Network?
- iii. Are alternative or additional measures needed to ensure sustainability of the program? If so, what is required to ensure continued sustainability and positive impact?
- iv. Which types of synergies are being developed between the Fellows and non-Program initiatives and groups?
- v. Do appropriate mechanisms exist to enhance network sustainability and alumni retention?

e) Impact

- i. Is the Program's theory of change still valid or does it need to change to ensure its resilience and reflect the needs and opportunities of the region?
- ii. Has the Program succeeded in setting goals for the management of the MAR ecoregion?
- iii. Have the Fellows made a difference in terms of improved management/conservation of resources in the MAR?
- iv. Has there been visible evidence of improvement in the MAR ecoregion and the areas where the Program is implemented?

² <https://www.healthyreefs.org/cms/report-cards/>

- v. How have the Fellows' projects impacted the MAR in a cultural, environmental, economic, and social way?
- vi. What could have been the likely situation (of the MAR) without the Program?
- vii. What mechanisms and objective indicators can be used to evaluate the impact in the short, medium, and long term? How could monitoring data be used for continual improvement and evaluation of the Program?
- viii. What has been the impact of the projects on public policies in each country and regionally?
- ix. Are there market-based solutions incubated through the Program? Have these projects received private capital/investment? What is their return of investment?
- x. What is the full impact of the relationships and networks developed between the Leaders from the same and different cohorts?
- xi. Which leadership skills are strengthened the most through the Fellows' participation in the Program?
- xii. Has a gender-positive impact been developed in the region through the projects promoted?

V. Methodology

The Evaluation Team should answer the key evaluation questions and propose a methodology, both quantitative and qualitative, to triangulate and validate the collected data. The methods developed may incorporate case studies, narrative/stories, interviews, text analysis, 360° feedback surveys, pre/post interventions, static retrospective reviews and critical reflection. Diverse information sources are expected to be used. The evaluation must necessarily include information and input collected from FMCN's Staff, Fellows from the four countries, donors, and stakeholders, as well as experts who have contributed to this Program and the executive committee. The exploration of other sources that complement the evaluation is encouraged, for example information coming from mentors, speakers, community leaders and organizations -where the leaders have worked-, program-generated data, proxy sources and leveraged dollars from the projects.

The proposal made by the Evaluation Team should provide a detailed account of the proposed methodology, including -but not restricted only to- the following elements:

- Proposed plan for collecting information, including means of interacting with Fellows, their institutions, and other stakeholders.
- Proposed structure and delivery of interviews with Fellows, program consultants, other experts, project beneficiaries, donors, MAR Leadership program staff, executive committee and others.
- Proposed approach for processing, consolidating, and systematizing field information.
- Proposed structure/table of contents of the evaluation report.
- Proposed approach to incorporate changes and adjustments to the interim report and format for presentation of the final report, including table of contents.

VI. Sources of information (personal and documentary)

The Evaluation Team may refer to the Program's website (<http://liderazgosam.org/?lang=en>) for general information about program contents, including past Fellow profiles, field projects and projects' development. Additional materials and strategic documents will be provided by MAR Leadership Team.

The primary audience for this evaluation is the Executive Committee of the Program, donors, MAR Leadership staff and Fellow alumni and other interested audience. The evaluator(s) is expected to have direct communication with at least 60% of the Fellows either through online meetings, phone calls, and/or surveys.

VII. Capacities and composition of the Evaluation Team

- College degree. It will be considered an advantage if they have special training in project management.
- Experience in evaluating programs/projects with an emphasis on conservation or sustainable development and capacity building (preferably Leadership programs).
- History of designing and conducting impact evaluations using both quantitative and qualitative methodologies.
- Familiarity with a set of diverse research methods for evaluating capacity building programs.
- Fluency in English and Spanish (oral and written).
- Conservation experience in one or more of the MBRS countries.
- The evaluation team leader will be responsible for ensuring the quality of the final report. Its specific tasks are:
 - Design methodologies, develop and ensure compliance with the work program.
 - Ensure communication with the Program Director.
 - Attend the virtual meetings required by the SAM Leadership Program Staff.
 - Collect and analyze the information.

If hired, the evaluation team leader will be asked to sign a confidentiality letter with FMCN.

VIII. Deliverables

At a minimum, the final report should include:

- 1) Executive summary.
- 2) Scope/objectives of the evaluation.
- 3) Evaluation methodology (including questions selected).
- 4) Main findings and analysis/answers to the questions presented in the present document.
- 5) Lessons learned.
- 6) Recommendations (program-wide and topic-specific).
- 7) Conclusion.
- 8) Appendices: program background, Terms of reference, work plan, documents reviewed, notes from surveys and interviews, lists of people interviewed, data collection instruments, and other elements relevant to the evaluation.

The final report, in English and Spanish, should be single spaced and a maximum of 25 pages, excluding appendices and the confidentiality letter.

IX. Period to develop the evaluation

The evaluation is to be carried out over a four-month period, between November and March 2022.

Activity	Timing	Notes
Deadlines to submit the proposal	November 1 st , 2021	.
Presentation of proposed questions and measurement strategy to MAR Leadership’s Executive Committee	November 2021	The presentation will be held on an online platform (1 hour). Prior to the presentation, the evaluator(s) will receive guidance from the Program Director

Submission of interim report.	February 2021	Report in electronic format (Word Document).
Oral presentation regarding the most relevant findings of the evaluation.	February 2022	The presentation will be held on an online platform (1 hour).
MAR-Leadership Executive Committee and Staff provide written comments.	February 2022	
Submission of final report with comments addressed.	March 2022	Report in electronic format (Word Document).

X. Profile required

It is required to be a Company/Legal Entity registered in *Secretaría de Hacienda y Crédito Público* (SHCP) of Mexico or the country of origin and issue tax receipts according to current legislation.

Interested parties should submit the following:

- Technical proposal that details the schedule of activities, the methodology to be developed in the consultancy, and anticipated deliverables (10 pages maximum).
- Financial proposal with a detailed budget in Mexican pesos or U.S. dollars.
- Curricular profile of no more than 2 sheets long.
- Updated Taxpayer ID cover page.
- Budget proposal including taxes (separate document from the technical proposal).
- Sample of relevant/related work.
- Three professional references.

We are open to additional information that the applicants may consider relevant for the review of their qualifications and proposal.

XI. Budget

The maximum amount to request is 25,000 USD (Added Value Tax included).

XII. Payments

The corresponding contract includes 3 payments in total; the first payment will be of 30% at the signing of the contract, the second will be of 40% and will correspond to the presentation of the intermediate report, and the third payment of the remaining 30% will be made with the delivery of the final report, including the comments attended and the deliverables.

XIII. Selection process

Proposals should be submitted by **November 1st, 2021**, and sent by e-mail to María Eugenia Arreola, Director of the MAR Leadership Program, maria.arreola@fmcn.org.

FMCN will inform applicants of the MAR Leadership Program Executive Committee's decision no later than November 22nd, 2021.

XIV. Contact

María Eugenia Arreola, Director of the MAR Leadership Program. Email: maria.arreola@fmcn.org.
Phone: (52) 55 5611 9779.