

**Request for proposal for: Subject Matter Experts – Protected Area Management capacity building**

The Zoological Society of London (ZSL), a charity founded in 1826, is a world-renowned centre of excellence for conservation science and applied conservation, working in over 50 countries around the world.

The Professionalising Conservation initiative aims to establish the first ever set of global professional standards in conservation. As part of this, ZSL are partnering with the National Geographic Society to produce a suite of standardised and accredited training courses for all levels of protected area management. These courses will be developed by leading protected area practitioners and experts, and delivered through a dedicated online learning platform combined with practical courses at Regional Training Centres, overseen by an expert Advisory Board. The course framework has been designed to align with both the IUCN/WCPA Register of Competences for Protected Area Practitioners and the IUCN Green List Standard for Protected Areas. It is structured around six pillars: Protected Area Foundations; Organisation and Management Culture; Biodiversity Conservation; Site Management and Operations; Communities; and Assessing Performance. Phase 1 (up to early 2019) aims to deliver content for the Biodiversity Conservation pillar.

You are invited by us (“ZSL”) to submit a proposal for the provision of services detailed in the requirement section of this document. **This RFP is open call - successful candidates will be invited to interview as they apply.** The RFP will be closed once we have enough Subject Matter Experts for the delivery of Phase 1.

ZSL are not bound to accept the lowest priced or any Proposal and shall not be bound to accept the Proposer as sole supplier. Prices quoted shall remain firm for the duration of the contract. All applicable tax must be clearly shown.

The Proposal will be evaluated using the following criteria and weightings:

<b>Evaluation Criteria</b>	<b>Weighting</b>
E.g. Quality (logic, thoroughness, well-researched, clarity)	30%
E.g. Price (criteria – overall cost)	10%
E.g. Technical Merit (experience with capacity building; providing offline training, online training desirable; conservation biology expertise)	60%

Enquiries and returns regarding this RFP should be addressed to Ellie Smith via email [ellie.smith@zsl.org](mailto:ellie.smith@zsl.org).

Yours sincerely,



Nisha Owen  
EDGE of Existence Programme Manager

## 1. INSTRUCTIONS TO PROPOSERS

### 1.1 Definitions

For the purpose of this RFP and any subsequent contract the following definitions, unless otherwise noted, apply.

<b>ZSL</b>	Means [Zoological Society of London, Reg. Charity 208728]
<b>Contract</b>	Means any contract that results from this Request for Proposal
<b>Proposal</b>	Means a written offer submitted in response to this Request for Proposal
<b>Proposer</b>	Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposal
<b>Requirement</b>	Means the supply to be made by the entity that forms a Contract with ZSL in accordance with Part 2 of the RFP.

### 1.2 Amendments to RFP documents

ZSL may amend the RFP documents by issuing notices to that effect to all Proposers and may extend the RFP closing date and time if deemed appropriate.

### 1.3 Proposal Submission

The RFP should be emailed to:

Ellie Smith, [ellie.smith@zsl.org](mailto:ellie.smith@zsl.org)

Your email and tender should be clearly marked:

Subject Matter Expert, Professionalising Conservation, EDGE Programme

### 1.4 Acceptance of Proposals

A Proposal will not be accepted by ZSL unless and until ZSL has signed a Contract.

### 1.5 Confidentiality

All documents issued as part of RFP process are proprietary to ZSL and the information contained herein is confidential.

Except as required for the preparation of a Proposal, Proposers must not, without ZSL's prior written consent, disclose to any third party any of the contents of the RFP documents. Proposers must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

The Proposers' response will be held in the strictest confidence, and all decisions regarding the selection of a Proposer and all negotiations will be final and confidential.

### **1.6 Proposal Acknowledgement**

By participating in this RFP Proposers are indicating their acceptance to be bound by conditions set out in this Part of the RFP.

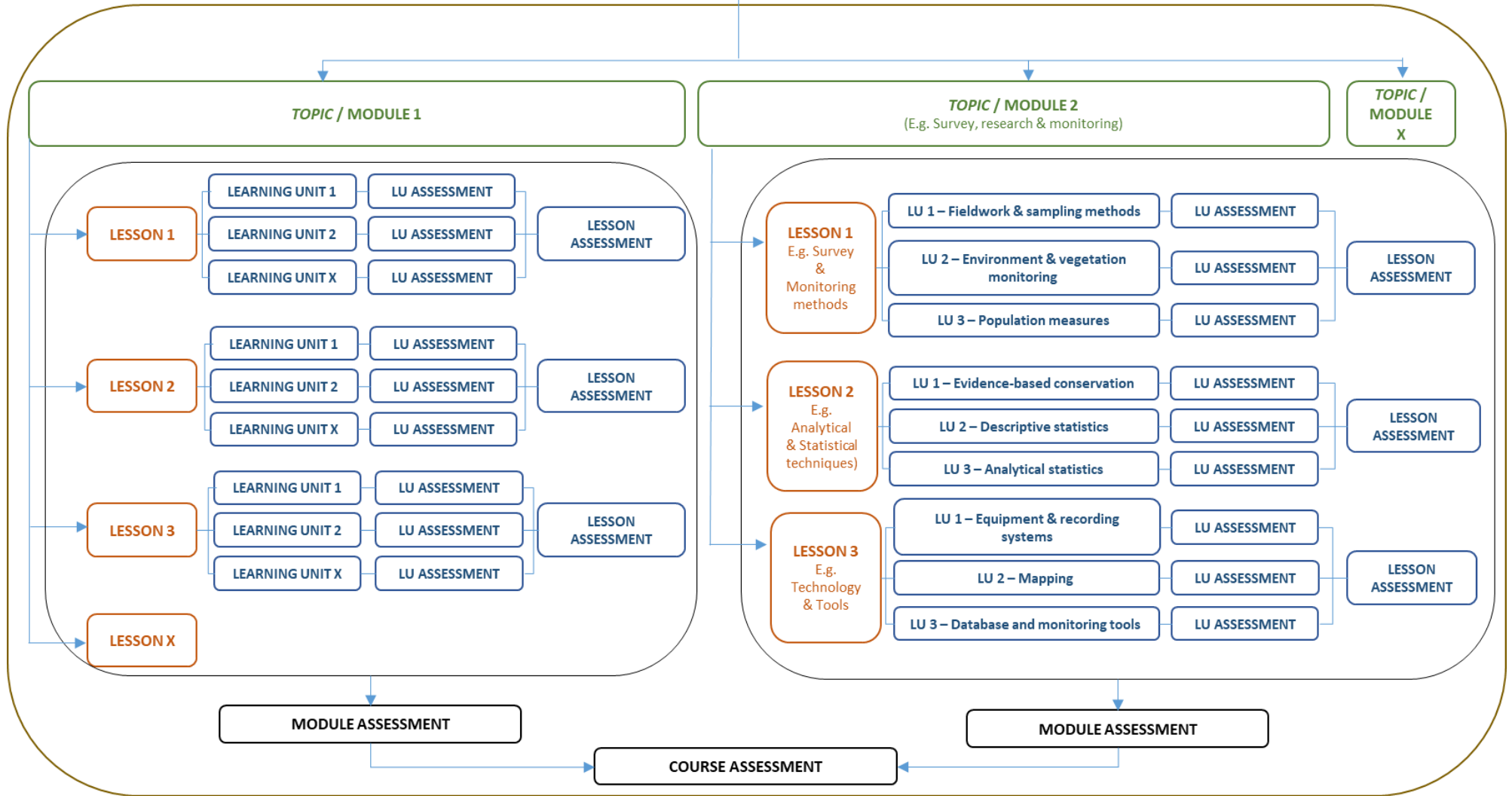
## 2. THE REQUIREMENT

<p><b>INTRODUCTION</b></p>	<p>The Zoological Society of London’s Professionalising Conservation (PC) project is seeking consultant Subject Matter Experts (SMEs), to provide expertise in the development of content for the production of new online and offline training materials for protected area practitioners all over the world.</p>
<p><b>SUMMARY</b></p>	<p>SMEs are invited to identify their topic of expertise from the Professionalising Conservation content framework (designed to align with both the IUCN Global Register of Competencies for Protected Area practitioners, and the IUCN Green List of Protected and Conserved Areas), for which they will design a module of content for an online course.</p> <p>Under the supervision of the Professionalising Conservation Project Manager (based at the ZSL headquarters, London, UK), SMEs will provide technical expertise for the development of learning materials for their given topic of expertise. While the courses are globally accessible and free, the target audiences are the 3 main levels within the protected area system as identified in the IUCN Global Register of Competencies – Skilled Workers (eg Rangers); Middle Managers; Senior Managers (for more info, see <a href="https://portals.iucn.org/library/sites/library/files/documents/PATRS-002-En.pdf">https://portals.iucn.org/library/sites/library/files/documents/PATRS-002-En.pdf</a> )</p> <p>SMEs will work closely with the PC project team to translate their technical content into appropriate online course material, for all three levels. Full examples of content formats will be provided in a detailed brief for successful applicants. It’s expected that SME’s will design their modules to reflect current sector-acknowledged best practice, making use of IUCN/WCPA PA Best Practice Guidelines, as well as best practice identified and published by other IUCN Commissions, latest relevant research, and also major contributors to supporting PAs such as Ramsar and UNESCO.</p> <p>See the Course Structure on page 6 for an example outline of a course.</p> <p>The size of each module will be weighted by sets, which represent the time invested by the learner – see the table below outlining the modules within the Biodiversity Conservation course, and the suggested number of sets in each of the modules (this is subject to change based on SME recommendations). We expect that each set will contain around 6 hours of learning materials. Roughly, this will be broken down into 1.5 hours of contact material (various learning units as listed in detail within the brief) 1.5 hours of self-directed reading/learning; and 3 hours of assessments – 50% of which will be marked, 50% of which will be structured exercises.</p>

	<b>COURSE</b>	<b>MODULES</b>	<b>SETS</b>
	<b>Biodiversity Conservation</b>	Ecosystems and Species	<b>1</b>
		Threats to biodiversity	<b>1</b>
		Survey, Research and Monitoring	<b>2</b>
		Conservation Actions	<b>3</b>
<b>DELIVERABLES</b>	See Table 1 on pages 7 & 8		
<b>REQUIREMENTS</b>	SMEs must have extensive expertise in at least one of the topic areas in Table 2 (pages 9-11), and experience in education or training.		

# Course Structure

PILLAR / COURSE (E.g. Biodiversity Conservation)



<b>Table 1: SME responsibilities and timeline</b>		
<b>Responsibility</b>	<b>Deliverables</b>	<b>Timeline</b>
<b>Work assessment - refining aims and objectives for your topic and agreeing contract terms</b>		
Review proposed learning objectives for your topic, as related to the Protected Area Management learning framework and IUCN Global Register of Competencies		Within week 1
Identify any missing learning objectives; and determine priority learning objectives for inclusion in the online learning module, and recommend which should be delivered in an offline format.		Within week 1
Assess time required to achieve all project deliverables and agree contract terms	Contract signed	Within week 2
<b>Instructional design - translating framework competencies into learning objectives and module content planning</b>		
Module outline drafted - setting out hierarchy of learning objectives for each Module, Lesson and Learning Unit	Module outline doc (template provided)	Within week 2
Assessment plan drafted - learning unit quick assessments, lesson assessments, and full module assessments	Assessment plan doc (template provided)	Within week 3
Detailed module plan drafted (including all learning content to be created - structured by learning units, lessons, and assessments)	Detailed module plan doc (template provided)	By end of week 3
Detailed module plan finalised after review	Final module plan	By end of week 4
<b>Content production - creation of learning content (to be delivered in batches for each lesson, so that review process is parallel to content production process)</b>		
Drafting and review of scripts and storyboards for video content (case studies prioritised over narrated and talking-head videos)	Final video scripts, storyboards, associated video materials, pdfs/powerpoints,	3 weeks per batch (equating to 1 lesson)
Drafting and review of interactive pdfs/powerpoints for non-video content		2 weeks per batch (equating to 1 lesson)

Required source material to be included in video content (key illustrations/graphics etc. such as graphs or other data examples)	assessments, provided for all online learning units	1 week per batch (equating to 1 lesson)
All supporting material provided - glossaries, additional resources, reference lists providing citations and sources for all resources	(Template briefs and slides for scripts, storyboards, pdfs, powerpoints, assessments, glossaries, provided)	1 week per batch (equating to 1 lesson)
Assessments activities drafted, reviewed and created		2 weeks per batch (equating to 1 lesson)
Finalise all materials, ready for upload and testing on the Learning Management System		
<b>Contact points – <i>working with the variety of stakeholders involved in the project</i></b>		
Work closely with Professionalising Conservation Capacity & Conservation Specialist on technical content		Throughout
Work closely with Professionalising Conservation Project Manager on workflow, timing and deliverables		Throughout
Aim to review content development with other experts/practitioners working on your course		Throughout
Via the above, content will be reviewed as required by the Technical Review Panel, Advisory Board, and The National Geographic Society		Throughout



**Table 2: Professionalising Conservation content framework – Topics within the Biodiversity Conservation Pillar (SMEs are each required to complete one entire module)**

TOPIC/MODULE	PROPOSED CONTENT (SUBJECT TO MODIFICATION BY SME)
Ecosystems and Species	Ecology and conservation requirements of key species.
	Detailed knowledge of the ecology and conservation requirements of key ecosystems.
	Relevant specialist knowledge of species/ taxonomic group(s)/ecosystems.
	Use of field guides, keys or specimens to identify species. Fieldwork skills.
	Common, typical and important species of the PA. Basic plant and animal taxonomy.
Threats	Main threats (actual and potential) posed by threats <i>such as development, illegal wildlife trade, climate change, land use change or alien invasive species (AIS)</i>
	Main wildlife conflicts and issues affecting PAs. Ecology of problem species.
	Main threats to the biodiversity of the PA, their signs and impacts
Survey, Research and Monitoring	Principles and practices of biodiversity research and monitoring.
	International regulations regarding endangered species (e.g. CITES). Principles of ethical and responsible research and specimen collection. Issues and legislation related to biopiracy, access and benefit sharing.
	Principles and theory of surveying and monitoring. A wide range of relevant survey and monitoring techniques and their uses. Identification of monitoring indicators. Analytical and statistical techniques. Research, analysis and reporting skills. Fieldwork skills.
	Principles and theory of surveying. A wide range of relevant survey techniques and their uses. Working with local communities (see COM). Analytical and statistical techniques. Research, analysis and reporting skills (see ADR and CAC) and fieldwork skills (see FLD).
	Detailed knowledge of focal species. Management options relevant to the conservation of the focal species.  Principles of scientific and evidence-based assessment and decision making. Local and traditional knowledge and management practices.
	Detailed understanding of the focal habitats and ecosystems. Management options relevant to the conservation of the focal habitat/ecosystem. Principles of scientific and evidence-based assessment and decision making. Local and traditional knowledge and management practices.
	Scientific principles and practical aspects of sustainable use. Ecology of focal species.

	<p>The purpose, theory and practice of the measures to be implemented.  Required equipment and logistics.  Training, leadership and instructional techniques (see HRM).  Fieldwork skills (see FLD).  Analysis and reporting skills (see ADR and CAC).</p>
	<p>Practical techniques for animal capture.  Possession of required qualifications, licences, etc. (e.g. use of firearms, use of tranquillisers, animal handling, etc.).  Legal, ethical and security aspects of animal capture.</p>
	<p>Principles and practices of horticulture/arboriculture.  Care of living plants.  Habitat restoration techniques using plants.</p>
	<p>Preparation of specimens for inclusion in collections.  Day-to-day maintenance and care of specimens.  Maintenance of collection catalogues and databases.</p>
	<p>Legal, safe, humane and correct practices and techniques for animal care.</p>
	<p>Principles of plant care.  Practical horticultural/silvicultural techniques.</p>
	<p>Procedures for collecting and recording information in the field.  Use of standard forms and recording systems and devices.  Use of maps and GIS.</p>
	<p>Technology (remote sensing, UAS, GPS telemetry, camera trapping, WSN, integrated technologies (SMART))</p>
Conservation Actions	<p>Options and best practices for conservation measures (e.g. physical protection, population management, habitat enhancement, removal of threats, etc.).</p>
	<p>Range of options and best practices for conservation measures (e.g. physical protection, active management, recovery and rehabilitation, restoration, creation, removal of threats).</p>
	<p>Range of options and best practices for addressing threats <i>such as</i> AIS.</p>
	<p>Range of products, uses and harvesting techniques (e.g. timber, fuel wood, non-timber products, fish, game, etc.).  Details of groups involved in harvesting.  Principles of sustainable harvesting and assessment of sustainable yields.</p>
	<p>Range of solutions to conflicts and their applicability (e.g. culling, trapping, physical barriers, deterrence measures, changes in land use practice and human behaviour, compensation schemes).  Wildlife monitoring techniques.</p>
	<p>Principles, practices and legal and ethical requirements for animal control, capture and husbandry in captivity.  Principles and practices of conservation breeding.</p>
	<p>Principles and practice of species reintroductions (based on recommendations of the IUCN Reintroduction Specialist Group).</p>
	<p>Principles and practice of horticulture and plant care.</p>

	Principles and practice of landscape engineering. Principles and practice of large scale planting and revegetation. Principles and practice of hydrological engineering.
	Practical techniques for animal control. Possession of required qualifications, licences, etc. (e.g. for firearms, tranquillisers, poisons, animal handling, etc.). Legal, ethical and security aspects of control measures.
	Legal, safe and humane control, capture and handling techniques.
	Conservation tools (World Database on Protected Areas (WDPA), Digital Observatory for Protected Areas (DOPA), The Red List, Global Forest Watch (GFW), etc.), Environmental and Social Impact Assessments (ESIAs)

<b>EXCLUSIONS</b>	<p>Proposers will be excluded from this RFP if:</p> <ul style="list-style-type: none"> <li>• they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;</li> <li>• they or persons having powers of representation, decision-making or control over them have been convicted of an offence concerning their professional conduct by a judgment of a competent authority which has the force of <i>res judicata</i>;</li> <li>• they have been guilty of grave professional misconduct proven by any means which the Beneficiary(ies) can justify;</li> <li>• they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Beneficiary(ies) or those of the country where the contract is to be performed;</li> <li>• they are not in compliance with their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed.</li> <li>• they or persons having powers of representation, decision making or control over them have been the subject of a judgment which has the force of <i>res judicata</i> for fraud, corruption, involvement in a criminal organisation, money laundering or any other illegal activity, where such illegal activity is detrimental to the EU's financial interests;</li> </ul>
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	<ul style="list-style-type: none"> <li>• they are currently subject to an administrative penalty referred to in section 2.3.4 of the Practical Guide</li> </ul> <p>Proposers must certify below that they are not in one or more of the situations listed above.</p> <p>Do you confirm that you are not in one or more of the situations listed above? (Delete as appropriate)</p> <p>Yes/No</p> <p>Proposers are expected to abide by ZSL’s Supplier Code of Conduct which is available for viewing at: <a href="https://www.zsl.org/sustainability-at-zsl/supplier-code-of-conduct">https://www.zsl.org/sustainability-at-zsl/supplier-code-of-conduct</a></p> <p>Do you confirm that you agree to abide by ZSL’s Supplier Code of Conduct? (Delete as appropriate)</p> <p>Yes/No</p>
<b>CONSULTANCY DATES</b>	Approx. 6 month duration
<b>PAYMENT</b>	<p>Payment to consultant will be made in arrears on a monthly basis from the date of receipt of a valid invoice. Each invoice shall detail reporting against each of the agreed deliverables to the Professionalising Conservation Project Manager.</p> <p>Reasonable expenses incurred in the course of delivering the contract, such as extensive travel for meetings, will be reimbursed in accordance with ZSL policy.</p>
<b>APPLICATION DETAILS</b>	<p>Applicants should apply via email to <a href="mailto:ellie.smith@zsl.org">ellie.smith@zsl.org</a> and their proposal should include:</p> <ol style="list-style-type: none"> <li>1) CV</li> <li>2) A proposal outlining experience in delivering training (including online if applicable), expertise in their topic/module of choice from the framework, proposed cost to complete on all deliverables, and a time estimate for producing content. (NB, cost estimates can be provided on a day rate basis, or for the full module completion, however, an estimated completion timeline must also be provided)</li> </ol> <p>You must ensure that your application includes your terms of contract covering all fees and desired benefits. The contractor will be responsible for all registration, taxes and other payments and deductions as required in their country of residence.</p> <p>We regret that we will only be able to contact Proposers who have been selected for interview. Successful candidates will be invited to a Skype interview shortly after submitting their application.</p> <p><b>The Zoological Society of London is a charity registered in England and Wales: no. 208728.</b></p>