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AMAZON COOPERATION TREATY ORGANIZATION -ACTO

TERMS OF REFERENCE

**FOR THE HIRING OF A SPECIALIST CONSULTANT FOR THE DEVELOPMENT
AND IMPLEMENTATION OF A COMPREHENSIVE RESOURCE MOBILIZATION
AND FUNDRAISING STRATEGY FOR ACTO**

Executing Agency: Amazon Cooperation Treaty Organization -ACTO

Project duration: 12 months



Brasilia, 2025



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TERMS OF REFERENCE

DEVELOPMENT AND IMPLEMENTATION OF A COMPREHENSIVE RESOURCE MOBILIZATION AND ENVIRONMENTAL FUNDRAISING STRATEGY FOR THE ACTO

I. BACKGROUND

The ACTO, founded in 1998, is composed of eight Amazonian countries: Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Suriname and Venezuela, all signatories of the 1978 Amazon Cooperation Treaty (ACT). It is an intergovernmental organization based in Brasília, Brazil, whose Permanent Secretariat promotes sustainable development in the Amazon region.

To improve its management capabilities and ensure the efficient use of international financial resources, ACTO has identified the need to establish new administrative mechanisms. This institutional renewal has been driven by the recent Declaration of Belém (Brazil, 2023), in which the presidents of the member countries agreed to strengthen ACTO and expand its cooperation and coordination capacities.

The Belém of Pará Declaration and the IV Meeting of Presidents of the Member States of the Amazon Cooperation Treaty (August 2023), was the starting point for the Permanent Secretariat of the Amazon Cooperation Treaty (SP/ACTO) to initiate research and study work for the implementation of a Financial Mechanism for the Amazon, which was mandated by the Presidents through Resolution RES/XIV MRE-OTCA/02.

This Financial Mechanism seeks not only to ensure the continuity of current projects, but also to provide a source of long-term sustainable financing, facilitating the participation of public and private actors, as well as international organizations. Consistent with ACTO's strategic criteria, this mechanism is based on the principles of regional cooperation, social equity, respect for the rights of indigenous peoples and sustainable use of natural resources, thus consolidating a shared vision for the protection and development of the Amazon.

The SP/ACTO seeks to establish a Financial Mechanism oriented towards Amazonian cooperation, which will allow the raising and capitalization of non-reimbursable financial resources from various sources, including voluntary contributions from the States Parties, international cooperation resources, development banks and other donors endorsed by the States Parties for the purpose of financing projects, programs, studies and other initiatives of national and regional scope, strengthening human and institutional capacities, as well as the permanent exchange of experiences among the Amazonian countries.

Empirical evidence and new standards of practice provide clear, strategic and relevant guidelines for the implementation of new environmental funds, inspiration and continuous learning models inspire the use of good practices to achieve more quickly the goals and objectives of the new Financial Mechanisms, for this reason, our model following these good practices sees the need to hire an Expert Consultant for the design of the Integral Strategy for resource mobilization and environmental fundraising for ACTO.

This consultancy will be carried out within the scope of the activities of the Amazon Basin Project - Implementation of the Strategic Action Program (SAP), executed by ACTO and implemented by the United Nations Environment Program (UNEP) with funding from the Global Environment Facility (GEF), which includes actions to support the institutional strengthening of ACTO.

II. JUSTIFICATION

According to data from the Brazilian Information Service of the Ministry of Foreign Affairs, the Amazon is a vast region that covers approximately 40% of the South American territory and is home to some 38 million people. This ecosystem is fundamental to global biodiversity, harboring the world's largest megadiverse forest and being home to 20% of all existing species of fauna and flora. In addition, the Amazon Basin contains about 20% of the planet's fresh surface water, playing a crucial role in climate regulation and the global hydrological cycle.

The implementation of a Financial Mechanism called the Amazon Environmental Protection Fund could directly benefit millions of people who depend on this ecosystem. For example, similar initiatives have shown significant results: in Colombia, agri-environmental and sustainable economy projects have benefited more than 20,000 indigenous families, conserving nearly 97,000 hectares of forest . ¹

In addition, the "Amazon for Life" Fund, launched in collaboration between the Coordinating Body of Indigenous Organizations of the Amazon Basin (COICA) and the Inter-American Development Bank (IDB), has an initial capital of US\$10 million to finance projects focused on bioeconomy and conservation . ²

These examples indicate that a well-structured environmental protection fund has the potential to positively impact tens of thousands of families in the region.

As mentioned in the background, the Belém, Pará Declaration and the IV Meeting of Presidents of the Amazon Cooperation Treaty Member States (August 2023), was the starting point for the Permanent Secretariat of the Amazon Cooperation Treaty (SP/ACTO) to initiate the formation of a Working Group to guide the research and studies for the implementation of a Financial Mechanism for the Amazon in 2024.

It is essential for ACTO to develop a Comprehensive Strategy for Resource Mobilization for several reasons:

A comprehensive strategy would allow for better coordination among these member countries, optimizing resources and avoiding duplication of efforts in conservation and sustainable development in the region.

This integrated strategy would facilitate the channeling of direct financial resources to communities and territorial organizations, optimizing resources, reducing intermediation and guaranteeing positive impacts on the conservation of the Amazon.

Having a strategy would contribute to strengthening indigenous governance and regional collaboration, aspects highlighted in initiatives such as the IDB's Amazon Siempre program, which seeks to expand regional financing and collaboration for the protection of the Amazon and its communities.

Finally, the Amazon faces threats such as deforestation and illegal mining, which have devastating effects on human rights and biodiversity. A comprehensive strategy would more effectively

¹ [HTTPS://MINAMBIENTE.GOV.CO](https://minambiente.gov.co)

² [HTTPS://MINAMBIENTE.GOV.CO](https://minambiente.gov.co)



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address these challenges, promoting solutions such as improved environmental monitoring, regional cooperation and the effective participation of indigenous communities.

In summary, the development of a Comprehensive Strategy for Resource Mobilization by ACTO is crucial to ensure the effective protection of the Amazon, the well-being of its inhabitants and the conservation of its invaluable biodiversity.

III. GENERAL OBJECTIVE

Design a Regional Strategy for Fundraising and Resource Mobilization of the Financial Mechanism of ACTO with a focus on its eight member countries, for the SP/ACTO to improve, increase and ensure financial sustainability, diversified and sufficient for the implementation of strategic environmental projects and programs for the Organization, based on a context analysis, a mapping of donors and the structuring of the portfolio of potential donors from the public and private sector (traditional and non-traditional), international cooperation resources, development banks, bilateral support, funds, foundations, philanthropic contributions and other potential donors, under the regional institutional guidelines (policies, strategies and plans) related to resource mobilization, as well as in line with the values and mission of ACTO, ensuring quality, coherence and relevance.

To this end, the following specific objectives must be met.

IV. SPECIFIC OBJECTIVES

1. Elaborate a comprehensive mapping of donors and funding sources for the Financial Mechanism of ACTO (public, private, traditional and non-traditional), including development banks, bilateral and multilateral cooperation, international funds, foundations and philanthropic actors, in order to diversify and expand access to resources.
2. Conduct a context analysis and financial diagnosis that identifies financing trends, opportunities and challenges for resource mobilization in the Amazon, considering political, economic and environmental factors in the eight member countries, in order to design a strategic portfolio of environmental projects and programs aligned with ACTO priorities and its financial mechanism, regional institutional guidelines and donor expectations, ensuring coherence, viability and financial sustainability. Accredited ACTO together with the Adaptation Fund.
3. Develop the Regional Fundraising and Resource Mobilization Strategy for the ACTO Financial Mechanism to be implemented based on the Strategic Agenda established by the Declaration of Belém do Pará, which establishes the following strategic lines: Climate Change, Integrated and Sustainable Management of Transboundary Water Resources in the Amazon River Basin, Indigenous Peoples, Protection of Forests and Biological Biodiversity, Fight against illicit activities and environmental crimes, Sustainable Economy.
4. Improve the prospecting, fundraising and financial planning capacity of the SP/ACTO Financial Mechanism to increase its institutional capacities and team commitment to design, guide and implement the Trust Fund as a financing mechanism for ACTO.

V. SPECIFIC OBJECTIVES, ACTIVITIES AND DELIVERABLES



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Objective 1: Develop a comprehensive mapping of funds, donors and funding sources for the ACTO Financial Mechanism.

Minimum activities required to meet specific objective 1:

Desk review and analysis of funds and funding sources.

- Identification of trends, opportunities and priorities of funds and funding sources in Latin America and the Amazon.
- Focus on traditional and non-traditional donors, including development banks, bilateral/multilateral cooperation, international funds and philanthropy.
- Consideration of sub-regional specificities of ACTO member countries.

Identification, categorization and evaluation of financing sources.

- Classification of sources into public, private, traditional and non-traditional.
- Analysis of eligibility criteria, lines of financing, amounts available, periodicity and access restrictions.
- Evaluation of financing trends in the Amazon region for the ACTO Financial Mechanism.

Consultation with key actors and contact with donors

- Interviews with representatives of funding agencies and donors interested in the Amazon.
- Gathering of information on ACTO's interests and strategic priorities for the design of the Financial Mechanism.

Systematization and organization of information

- Creation of an **interactive database** of donors, classified by type of financing, country, amounts available and areas of interest.
- Creation of **technical sheets for each donor**, systematizing requirements, formats, contact protocols and other key elements for accessing financing.

Deliverables 1:

- Comprehensive map of funds, donors and funding sources, with categorization by type and sector for Amazon regional projects in its different strategic areas, classified by type of funding, country, amounts available, and areas of interest of the ACTO Financial Mechanism.
- Systematized database with detailed information on financing opportunities for ACTO and that can be raised by the FM.
- Funding trend analysis report and strategic recommendations for use in the ACTO Financial Mechanism grant platform.

Objective 2: Conduct a context analysis and financial diagnosis that identifies financing trends, opportunities and challenges for the performance of the ACTO Financial Mechanism and the mobilization of resources in the Amazon, considering political, economic and environmental factors in the eight member countries, which allows the design of a strategic portfolio of regional environmental projects and programs aligned with the priorities of ACTO and its financial mechanism.

Minimum activities required to fulfill specific objective 2:

Documentary review and analysis.

- Review of documents, previous studies and institutional policies of ACTO.
- Assessment of regional policies and environmental priorities of the eight member countries.



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Assessment of issues with funding gaps/challenges aligned with ACTO objectives.

- Mapping of funds acting on ACTO strategic objectives.
- Identification of gaps, overlaps and other related features.

Context analysis and funding trends

- Assessment of the political, economic and environmental context in the Amazon Region.
- Analysis of funding trends in environmental issues and sustainable development.
- Identification of opportunities and risks for resource mobilization, including institutional, financial and regulatory barriers.

Analysis of successful experiences and synergies

- Study of previous experiences in financing through Environmental Funds in the Amazon.
- Identification of synergies between existing initiatives and new financing opportunities.

Analysis and initiation of the accreditation process of ACTO to the Adaptation Fund.

- Review and analysis of process requirements, deadlines and accreditation form.
- Consolidation of ACTO institutional information, identification of possible gaps and recommendations to address them.
- Support in the identification of at least 2 PM for nomination letters.
- Preparation of accreditation application and supporting/justifying documentation.

Deliverables 2:

- Context analysis and financial diagnostic report, with assessment of trends, opportunities and challenges for the ACTO Financial Mechanism.
- Analysis and recommendations report on ACTO accreditation to the Adaptation Fund.
- ACTO accreditation form with supporting documentation.

Objective 3 Develop the Regional Strategy of the ACTO Financial Mechanism to be implemented based on the Strategic Agenda established by the Declaration of Belém do Pará, which establishes the following strategic lines: Climate Change, Integrated and Sustainable Management of Transboundary Water Resources in the Amazon River Basin, Indigenous Peoples, Protection of Forests and Biological Biodiversity, Fight against illicit activities and environmental crimes, Sustainable Economy.

Minimum activities required to meet specific objective 3:

Strategic alignment and compatibility with the Belém Declaration.

- Incorporation of strategic lines of interest of ACTO, ensuring compatibility with the priorities of the Belém Declaration and its resolutions.
- Identification of member country priorities and their alignment with potential donors.

Design of the strategic portfolio of projects and programs

- Formulation of the strategic portfolio of projects and programs for the ACTO Financial Mechanism.
- Prioritization of projects aligned with the Belém Declaration and search for synergies with donors.

Deliverables 3:



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- Proposed Action Strategy of the ACTO Financial Mechanism, with mechanisms and concrete actions concluded.
- Strategic portfolio of environmental projects and programs, aligned with ACTO and donor priorities for the ACTO Financial Mechanism.
- Financial feasibility analysis report and sustainable financing models to be applied in the ACTO Financial Mechanism.

Objective 4: Develop the Regional Fundraising and Resource Mobilization Strategy for the ACTO Financial Mechanism to be implemented based on the Strategic Agenda established by the Belém Declaration, which establishes the following strategic lines: Climate Change, Integrated and Sustainable Management of Transboundary Water Resources in the Amazon River Basin, Indigenous Peoples, Protection of Forests and Biological Biodiversity, Fight against illicit activities and environmental crimes, Sustainable Economy.

Minimum activities required to meet specific objective 4:

Identification and prioritization of key donors.

- Identification and prioritization of 5 key donors among the 10 most aligned with ACTO objectives (development banks, climate funds, philanthropy, private sector).
- Evaluation of their funding criteria in relation to priority issues (forests, climate change, water, indigenous communities, environmental crimes, etc.).
- Development of a Cultivation Plan for the top 5 prioritized donors and at least two high potential strategic initiatives.

Design of the Regional Fundraising and Resource Mobilization Strategy.

- Definition of the strategy's main lines of action, goals and management models.
- Design of a 3-5 year roadmap with concrete results at the national, sub-regional and regional levels.
- Identification of management tools to facilitate fundraising and administration of the MF.
- Assess priorities and funding criteria for the ACTO Financial Mechanism (forests, climate change, water, indigenous communities, environmental crimes, etc.).
- Elaborate a Cultivation Plan for the top 5 donors prioritized for the ACTO FM, and for at least two previously designed initiatives with high potential and significant growth for the region.

Validation and adjustments with key stakeholders

- Workshops with member countries and strategic stakeholders for feedback and alignment of the strategy.
- Review and adjustment of the strategy based on recommendations received.
- Validation with key stakeholders for ACTO and the MF.

Deliverables 4:

- Regional Fundraising and Resource Mobilization Strategy for the ACTO Financial Mechanism, with concrete mechanisms and actions finalized.
- Recommendations document for the financial sustainability of programs in the Amazon region for the ACTO Financial Mechanism.
- A Cultivation Plan for the top 5 prioritized donors, and for at least two previously designed initiatives with high potential and significant growth that can be disseminated with the ACTO FM.



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Improve the prospecting, fundraising and financial planning capacity of the SP/ACTO Financial Mechanism to increase its institutional capacities and team commitment to design, guide and implement the Trust Fund as a financing mechanism for ACTO.

Minimum activities required to meet Specific Objective 5

Institutionalization of resource mobilization

- Identification of diplomatic, technical and administrative instruments needed to strengthen the sustainability of the ACTO Financial Mechanism.
- Definition of key steps for its institutionalization within ACTO.

Promotion and generation of spaces for debate on financing

- Organization of webinars, conferences and meetings to discuss ACTO's financing mechanisms and their alignment with the Strategic Grant Agenda.
- Presentation of innovative experiences in financing for environmental protection and trust funds in the Amazon.
- Develop a document for decision makers promoting ACTO FM and the presentation of its conservation trust funds.

Deliverables 5.

- Reports or proceedings of the Workshops/Webinars organized, at least 2 Workshops and 1 Webinar on the Financing of Environmental Protection Funds with a Policy Brief on the application of innovative financial mechanisms in the Amazon.
- Compendium / publication of experiences and lessons learned on Environmental Funds and their best practices.

VI. PRODUCTS

Initial Product. 20 days after contract signature.

- Detailed Technical Proposal, adjusted, complemented and a Work Plan and methodological proposal presented schematically, to address the consultancy.

Product 1. Four months after contract signature.

- Comprehensive map of donors and funding sources, with categorization by type and sector for Amazonian regional projects in its different strategic areas, classified by type of funding, country, amounts available, and areas of interest of the ACTO Financial Mechanism.
- Systematized database with detailed information on financing opportunities for ACTO and that can be raised by the FM.
- Funding trend analysis report and strategic recommendations for use in the ACTO Financial Mechanism grant platform.
- Analysis report and recommendations on ACTO accreditation to the Adaptation Fund.

Product 2. Six months after contract signature.

- Context analysis and financial diagnostic report, with assessment of trends, opportunities and challenges for the ACTO Financial Mechanism.
- Strategic portfolio of environmental projects and programs, aligned with ACTO and donor priorities for the ACTO Financial Mechanism.



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- Document of recommendations for the financial sustainability of programs in the Amazon region for the ACTO Financial Mechanism.
- ACTO accreditation form to the Adaptation Fund with supporting documentation (progress).

Product 3. Eight months after contract signature.

- Organization of 2 donor roundtables support increased fundraising capacity. And letters of commitment from donors (2 reports of donor roundtables conducted).
- Design and operationalization of a system (internal to ACTO) to follow up with potential donors / funders.
- Design and implementation of an Opportunity Search Radar indexed on the ACTO web page.
- Regional Fundraising and Resource Mobilization Strategy for the ACTO Financial Mechanism, with mechanisms and concrete actions concluded.
- Financial feasibility analysis report and sustainable financing models to be applied in the ACTO FM.
- Operational guidelines document for the implementation of the ACTO Financial Mechanism.
- A Cultivation Plan for the top 5 prioritized donors, and for at least two previously designed initiatives with high potential and significant growth that can be disclosed with the ACTO FM.
- ACTO accreditation form to the Adaptation Fund with supporting documentation (final).

Product 4. Twelve months after contract signature.

- Reports or memories of the Workshops/Webinars organized, at least 2 Workshops and 1 Webinar on Financing of Environmental Protection Funds making a Policy Brief on the application of innovative financial mechanisms in the Amazon.
- Dissemination and dissemination plan of the ACTO financial mechanism to partners, donors and funders.
- Follow-up report on the accreditation process to the Adaptation Fund.

VII. PAYMENT SCHEDULE

<u>N° of products</u>	<u>% of payment</u>	<u>Deadline</u>	<u>Conditions</u>
Initial Product	20%	20 days after contract signature	Against submission and approval of the Work Plan
Product 1	20%	4 months after contract signature	Against submission and approval of the Deliverables established as Product 1.
Product 2	20%	6 months after contract signature	Against submission and approval of the Deliverables as Product 2.
Product 3	20%	8 months after contract signature	Against submission and approval of the Deliverables established as Product 3.
Product 4	20%	12 months after contract signature	Against the presentation and approval of the meeting minutes, reports, list of participants, compendium, videos and other Products established and detailed as Product 4.



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VIII. CONSULTANT'S PROFESSIONAL PROFILE

Academic Background

- Professional with a university degree in Economics, Public or Private Finance, Business Administration, Commercial Engineering, or related fields.
- Postgraduate degree: Specialist in fundraising, specialist in Environmental Funds, Corporate Finance. Trust Funds.
- Master's Degree in Development Projects or Fund Raising, MBA, Corporate Finance or Development Studies, Public or Private Administration of Cooperation Funds.
- Funds Specialist Certificate (desirable).

General Professional Work Experience

- At least 10 years of general experience working in fundraising for institutions and/or cooperation projects.

Specific Professional Experience

- Specific experience of at least 5 years working in environmental protection funds or Cooperation Funds for the financing of projects.
- Specific experience of at least 5 years elaborating and implementing Fundraising and Resource Mobilization Strategies.
- Specific experience of at least 7 years working in donor relations and fundraising for international cooperation projects and/or development agencies or multilateral organizations.
- Demonstrated or certified experience of at least 3 years in monitoring and fundraising for environmental projects.
- Experience in campaign management and organization of private fundraising events.
- Experience in the areas of Communication, Fundraising, Crowdfunding, Marketing.

Personal skills

- Excellent communication and negotiation skills.
- Institutional commitment to the vision, mission and strategic goals of the Organization.
- High sensitivity and adaptability in terms of political, intercultural, gender, religion, race, nationality and age issues, being able to show in practice a high level of respect for diversity.
- Ability to plan, prioritize and think strategically.
- Ability of adaptability and flexibility to achieve results.
- Capacity for self-management and initiative.
- Ability to work under pressure and meet deadlines with high levels of quality.
- Ability to mediate, problem solving and conflict resolution.
- Ability to network and foster teamwork.
- Experience in multicultural environments would be a plus.
- Negotiated or participated in the structuring of projects in partnership with different funding sources.
- Have a network of contacts in multilateral organizations and other different public and private funding entities.
- International Declaration of Ethical Principles of Fundraising and Crowdfunding.
- Computer skills: knowledge of specialized tools related to the position.

Languages

- Fluent in English and Spanish (spoken and written). Knowledge of other languages will be an asset: Portuguese.



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ANNEX

PRESENTATION OF THE TECHNICAL PROPOSAL

IX. FORM OF PRESENTATION OF THE TECHNICAL PROPOSAL

To apply, the applicant must submit a technical proposal of a maximum of 5 pages explaining the methodology, how to address each of the objectives, products and deliverables to be addressed and implementation schedule. An economic proposal including all costs must also be submitted.

X. DURATION, REMUNERATION AND WORKING CONDITIONS

- Labor contract for 12 months.
- Remuneration against delivery and approval of deliverables.

XI. CLASSIFICATION CRITERIA

Classification will be based on the following parameters:

Professional experience	70 points
Technical proposal	20 points
Economic Proposal	10 points

Qualification requirements (eliminary):

No.	Criterion (Yes/No)
1.	Professional with a Bachelor's degree in Economics, Public or Private Finance, Business Administration, Commercial Engineering, or related fields.
2.	At least 10 years of general experience working in fundraising for institutions and/or cooperation projects.
3.	Fluency in English and Spanish (spoken and written). Knowledge of other languages will be an asset: French, German and Portuguese.
4.	Specific experience of at least 5 years working in environmental protection funds or cooperation funds for the financing of projects.

TRAINING, QUALIFICATIONS AND EXPERIENCE OF THE CONSULTANT

Professional experience (70 points)

Expertise/Experience	Points
University degree in Economics, Public or Private Finance, Business Administration, Commercial Engineering, or related fields. Master's or PhD in economics, finance, MBA, Development projects or fund raising, MBA, Corporate Finance or Development Studies, Public or Private Administration of Cooperation Funds (Bachelor's Degree 4, Master's Degree - 7 points, PhD - 10 points)	10
At least 10 years of general experience working in fundraising for institutions and/or cooperation projects.	10



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Expertise/Experience	Points
Minimum of 7 years of experience working in fundraising for international cooperation projects and/or development agencies or multilateral organizations. It will be necessary to demonstrate results of previous work, both in the fulfillment of objectives and in the quality of these. (At least 7 years = 5 points, for each additional year 1 point up to 10 points).	10
Specific experience of at least 5 years working in an environmental protection fund or Cooperation Fund for the financing of projects.	5
Specific experience of at least 5 years elaborating and implementing Fundraising and Resource Mobilization Strategies.	5
Demonstrated or certified experience of at least 3 years in monitoring and fundraising for environmental projects.	10
Experience in managing campaigns and organizing private fundraising events (For each fundraising contract/event 1 point up to 7 points).	5
Experience in the areas of Communication, Fundraising, Crowdfunding, Marketing. (1 job - 3 points, 2 jobs - 5 points)	5
Personal Soft Skills	5
Languages English, Spanish	5
TOTAL	70

XII. DEPENDENCY AND SUPERVISION

The consultant will report to the Permanent Secretariat of the SP/ACTO and will be under the supervision of the SP/ACTO Administrative Directorate.

XIII. DURATION OF THE CONTRACT

This consultancy will have a duration of 12 months from the signing of the contract, with the possibility of an extension of the term, based on the results of the consultancy.

XIV. REMUNERATION

The consultant will receive a monthly payment with delivery of products to be agreed upon with the Administrative Direction and the Regional Coordination of the Amazon Basin Project.

When sending the letter of interest and resume for the position, the candidate must include his/her salary aspiration.

XV. PLACE OF WORK

The Consultant Fundraising Specialist will provide consulting services from his/her place of residence and will coordinate his/her activities with the Administrative Director of the ACTO and the Regional Coordination of the Amazon Basin Project.

XVI. ADDITIONAL INFORMATION

- Candidates must be available to start the consultancy work at the signing of the contract.
- Candidates must be willing and able to undertake international travel as required.
- The performance of the consultancy will not establish any relationship of dependency with the SP/ACTO.