

## **TERMS OF REFERENCE: MONITORING AND EVALUATION ADVISOR, 2023-2026**

**DEADLINE FOR APPLICATIONS: AUGUST 18, 2023**

### **Summary**

Forest Trends seeks an expert in monitoring and evaluation to serve as an advisor on the design and implementation of Monitoring, Evaluation, and Learning systems. Advisory services will primarily support our Natural Infrastructure for Water Security project (NIWS) in Peru, and Forest Trends' institutional monitoring & evaluation system in coordination with our headquarters in Washington D.C.

Work assignments will be contracted annually, or at other increments agreed by Forest Trends and consultant, with specific budgets, tasks, and deliverables. Any such work assignments contracted under this agreement are dependent upon Forest Trends securing work plan and budget approval from respective donors.

The maximum time-period covered by the scope of this framework agreement is up to three years, expected to begin August 2023.

The primary geographic focus for this scope is Peru, although work would also extend to Forest Trends' organization-wide monitoring initiatives.

### **About Forest Trends and the Natural Infrastructure for Water Security Project**

Forest Trends is a non-governmental organization based in the United States that works to conserve forests and other ecosystems worldwide through the creation and wide adoption of a range of environmental finance, market, and other payment and incentive mechanisms. Forest Trends does so by:

- Providing transparent information on ecosystem values, finance, and markets through knowledge acquisition, analysis, and dissemination;
- Convening diverse coalitions, partners, and communities of practice, to promote environmental values and advance development of new markets and payment mechanisms; and
- Demonstrating successful tools, standards, and models of innovative finance for conservation that include indigenous and local communities.

The Natural Infrastructure for Water Security (NIWS) Project is implemented by Forest Trends with its partners including the Consortium for the Development of the Andean Ecoregion (CONDESAN) and the Peruvian Society of Environmental Law (SPDA), with funding and support from the United States Agency for International Development (USAID) and the Government of Canada. The first phase of the Project began in December 2017. In its second phase (2023-2027), the Project will continue to scale-up gender-sensitive investments in natural infrastructure that will strengthen the water security and climate resilience of prioritized populations in Peru. This purpose is in service of a longer-term vision that unites NIWS' partners, which is that Peru strengthens its water security and climate resilience through nature-based solutions. For more information, visit: <https://www.forest-trends.org/who-we-are/initiatives-prev/water-initiative/natural-infrastructure-for-water-security-in-peru/>

## Tasks

Consultant will advise broadly on the design and implementation of monitoring, evaluation, and learning systems in Forest Trends, with an emphasis on the Natural Infrastructure for Water Security project in Peru.

While work assignments contracted under this framework agreement will define the specific tasks and deliverables for the required period, this section indicates illustrative tasks that the consultant would be expected to perform.

Tasks directly related to NIWS:

Advise the design of a practical monitoring and evaluation system that reflects the Project's Theory of Change, generates useful information, and responds to donor's needs

Support Forest Trends and our partners on selecting indicators and defining methodologies for data collection and analysis, including:

- Research standard definitions of current and potential indicators and evaluate their relevance against NIWS project activities
- Design workshops with NIWS team and donors to discuss needs and indicators
- Prepare analysis of the costs and benefits of using certain indicators and methodologies

Prepare sections of the Monitoring, Evaluation and Learning Plan

Research and inform best practices and methodologies for data collection on:

- investment mobilization of natural infrastructure projects, and their impacts (including economic beneficiaries, carbon emission reduction, and area under management)
- capacity building (including use of information, institutional performance, and beneficiary feedback)
- other relevant indicator data

Research and inform best practices for data quality control and assessment

Support Forest Trends to define internal workflows and procedures for the implementation of the Monitoring and Evaluation plan

Develop design for an updated information management system, and visual dashboards to track key indicators.

Train staff on the monitoring and evaluation systems

Design and facilitate monitoring & evaluation workshops

Propose continued learning and evaluation mechanisms including reflection questions and the methodology and approach to internal workshops

Tasks for Forest Trends' institutional initiatives:

Advise the design of an institutional Monitoring and Evaluation function that is aligned with existing programmatic monitoring, evaluation, and learning systems, responsive to donor needs, and supports the organization in tracking progress against its strategic plan, including:

- Coordinating with programs to design a "bottom-up," effective and efficient monitoring and evaluation function
- Refining a set of core indicators to monitor at the organizational level
- Develop design for an institutional KPI dashboard and information management systems
- Developing a plan for an ongoing Monitoring and Evaluation Function including staffing model, ongoing workflows and management of systems, to ensure systems are established,

- maintained, used, and successfully provide useful results for the organization and its stakeholder groups, including funders
- Advise on design of annual planning processes feeding into institutional monitoring and evaluation systems
- Train staff and stakeholder groups as needed on new systems and processes

### **Minimum Qualifications**

Master's degree in public management, systems analysis, social sciences, environmental sciences, natural resources, or related field

At least 10 years of experience in data collection, processing, and analysis

At least 7 years of experience designing and implementing monitoring, evaluation, and learning programs for projects funded by international development agencies (including USAID)

Demonstrated experience in designing systems to generate relevant and useful information to evaluate project impact and serve donor needs

Demonstrated experience using database management systems (i.e., Teamdesk, or others) and generating useful visual information through dashboards and graphics

Experience working successfully in interdisciplinary and multi-cultural settings

Excellent written and verbal communication skills

Fluent in English and Spanish

Availability: approximately >50% time dedication between August-November 2023. Dedication will fluctuate thereafter on a needs basis.

### **Desired Qualifications**

Familiarity with topics and terminology related to nature-based solutions or water security, water and sanitation, or related fields

Demonstrated experience implementing M&E systems and collecting data in the field, especially in rural Peru or similar settings

Demonstrated experience implementing monitoring and evaluation activities with public institutions, especially in Peru

Demonstrated experience designing and/or implementing social monitoring systems of rural economies, i.e., changes in household income, improvements to health and wellness

### **Instructions for Interested Candidates**

Submit the following to [infraestructuraverdeinfo@forest-trends.org](mailto:infraestructuraverdeinfo@forest-trends.org) no later than August 18<sup>th</sup>, 2023:

Cover letter including the following:

- Expression of interest and motivation for the posting
- Description of education, experience, and skills that respond to indicated qualifications
- Description of what candidate would bring to scope
- Proposed daily rate for engagement<sup>1</sup>

CV

Applications will not be accepted after the indicated date.

Only pre-selected candidates will be contacted.

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<sup>1</sup> Work assignments contracted under this framework agreement will be agreed between Forest Trends and consultant based on estimated number of days required to carry out tasks/deliverables agreed for the assignment.