

Specialized Technical Services for the Development of Principles for the Engagement and Effective Participation of Indigenous Peoples, Local Communities and Afro-descendant Peoples in Jurisdictional Climate Finance

Forest Trends' Communities and Territorial Governance Initiative (CTGI)

Overview

- **Role:** Professional Technical Services Consultant
- **Duration:** May – October 2026
- **Compensation:** Payment based on deliverables, amount to be agreed upon
- **Location:** Remote

1. Introduction

Climate and conservation finance plays a central role in addressing the climate and biodiversity crises. Despite the growing recognition of the fundamental role of Indigenous Peoples, Local Communities, and Afro-descendant Peoples (IPs, LCs and ADPs) in protecting forests, ecosystems, and territories of high socio-environmental importance, structural barriers still hinder their direct, fair, and effective access to resources from global climate finance flows.

These challenges are reflected in decision-making processes, engagement, access to information, consultation, and benefit-sharing arrangements that are truly participatory, equitable, and fair.

Jurisdictional climate finance, due to its broad territorial approach, represents a strategic opportunity to promote the effective engagement and participation of these peoples and communities in decision-making processes that directly affect their territories.

Although there are numerous relevant references related to Free, Prior and Informed Consent (FPIC) and consultation processes, socio-environmental safeguards, and participatory good practices, there are still gaps in the consolidation of objective technical guidance that can support jurisdictions in adopting equitable and inclusive practices.

This Terms of Reference (ToR) aims to address this gap through the development of a set of Principles for the Engagement and Effective Participation of IPs, LCs and ADPs in Jurisdictional Climate Finance.



2. About Forest Trends and the Initiative

Forest Trends (FT) is an international non-profit organization working to conserve forests and other ecosystems through the development and promotion of financial mechanisms, environmental markets and incentive instruments aimed at environmental protection and sustainable development. The organization works to produce and disseminate transparent information on ecosystem values, financial flows and markets, as well as to build coalitions and strategic partnerships and demonstrate innovative environmental finance models.

The Communities and Territorial Governance Initiative (CTGI) is one of Forest Trends' initiatives and works in direct partnership with Indigenous Peoples, Local Communities and Afro-descendant Peoples to promote recognition and protection of their territorial rights, strengthen autonomous governance models and support community-led strategies for conservation, climate action and livelihoods aligned with well-being. CTGI's work seeks to ensure that these peoples and communities are recognized not only as beneficiaries, but as central actors and decision-makers in climate and conservation finance mechanisms affecting their territories.

3. Objective

To collaboratively and participatorily develop, alongside actors from the Global South, a set of Principles for the Engagement and Effective Participation of IPs, LCs and ADPs in Jurisdictional Climate Finance ("Principles"), containing technical, ethical, and normative guidance of non-binding nature.

The Principles aim to support national and subnational governments and other institutional actors in conducting participatory processes, particularly in the context of Jurisdictional REDD+ programs (JREDD+). The Principles are intended to complement ongoing actions in territories. They do not aim to replace legal frameworks, community protocols, or formal FPIC processes, but rather to function as a technical reference to promote social and environmental integrity and inclusive governance, enabling the effective channeling of climate finance resources to the territories of IPs, LCs, and ADPs.

4. Scope of Work

The Consultant shall provide specialized technical services for the development, systematization, and consolidation of the Principles under the strategic coordination of FT-ICGT. The work will include the following activities:

- Development of a workplan and participatory methodology;
- Review and analysis of relevant technical and normative references;
- Systematization of guidelines related to FPIC, socio-environmental safeguards, benefit-sharing, and inclusive participatory practices;

- Mapping of key stakeholders (national and international, from Latin America, Asia-Pacific and Africa);
- Facilitation of participatory processes to gather inputs from key stakeholders;
- Drafting, reviewing, and progressively consolidating the Principles;
- Systematization of lessons learned and recommendations.

The Consultant shall operate with technical autonomy, ensuring conceptual consistency, analytical quality, and proper organization of references. The report and other products shall be written and delivered in either English or Portuguese.

5. Expected Deliverables

The Consultant shall submit the following deliverables. Each deliverable will be reviewed by the Forest Trends technical team for alignment with project objectives and high-integrity standards:

- Work plan and methodology:** methodological approach, preliminary references, engagement strategy and timeline.
- Guiding Document for the Development of the Principles:** conceptual context, stakeholder mapping, preliminary structure of the Principles, participatory methodology.
- Preliminary Version of the Principles:** validated conceptual structure, conducted, consultations, systematization of results and preliminary practical implications.
- Revised Version of the Principles and Validation Report:** incorporation of stakeholder contributions, summary of validation process.
- Validated Version of the Principles:** consolidated document ready for final review.
- Final Version of the Principles:** final document approved for publication.
- Recommendations Document for Pilot Application:** lessons learned, challenges and opportunities and technical recommendations.
- Documentary Base and Technical Annexes:** references, contribution matrices and supporting materials.
- Occasional Participation in Dissemination Activities:** support for meetings, webinars and strategic dissemination actions when requested.

All final outputs must be submitted in editable formats (Word, Excel, PowerPoint, or equivalent), as well as in final PDF versions, when applicable.

The proposed detailed description of the activities suggested and expected for each deliverable is provided in **Annex 1**.

6. Timeline

The consultancy is expected to have an estimated duration of six (6) months, with implementation anticipated to take place between May and October 2026.

The indicative schedule for implementation and deliverables is presented below. Both the timeline and the contracting period may be adjusted by mutual agreement between the parties.

Period	Deliverables	Deadline*
Month 1	A–Work Plan and Methodology	2 weeks
	B–Guiding Document for the Principles	4 weeks
Month 2	C–Preliminary Version of the Principles	8 weeks
Months 3 - 4	D–Revised Version and Validation Report	16 weeks
Month 5	E–Validated Version	20 weeks
Month 6	F–Final Version of the Principles	24 weeks
	G–Recommendations Document for Pilot Application	
	H– Documentary Base and Technical Annexes	
Ongoing	I– Dissemination Activities	<i>During implementation</i>

*Deadlines are counted from the contract signature date.

7. Proposal and Selection Process

Interested candidates shall submit a **technical and financial proposal**, which will be evaluated by the responsible team. The technical proposal must demonstrate the methodological approach proposed for the execution of the project and an indicative timeline, as well as relevant experience, including *curriculum vitae* and references regarding similar work conducted by the Consultant.

The financial proposal shall indicate the total value of the consultancy, preferably broken down by deliverable or phase, and be compatible with the scope, complexity, and duration of the work described in these Terms of Reference. Selection will be based on the technical quality, the consultant’s experience, and financial adequacy.

Forest Trends and the Communities and Territorial Governance Initiative reserve the right to request clarifications or negotiate adjustments with the selected candidate.

Candidates must submit:

- Technical proposal (maximum 5 pages) including methodological approach, timeline, and relevant experience.
- Financial proposal with values expressed in United States’ dollars (USD).
- Curriculum vitae and technical references from previous work.

8. Consultant Profile

The Consultant (or specialized team) shall demonstrate proven experience in socio-environmental governance, the rights of Indigenous Peoples, Local Communities and Afro-descendant Peoples (IPs, LCs and ADPs), and climate finance (preferably at the jurisdictional level). As an independent professional, the consultant will be responsible for providing their own equipment and software necessary for the completion of the deliverables and for managing their own schedule in order to meet project milestones.

Mandatory Requirements:

- Minimum of 10 years of relevant experience in the field.
- Experience in the preparation of technical documents and guidelines.
- Knowledge of socio-environmental safeguards and FPIC (Free, Prior and Informed Consent).
- Fluency in Portuguese, English, and Spanish.

Desired Requirements:

- Experience working with governments and participatory processes.
- Knowledge of Jurisdictional REDD+ (JREDD+) and jurisdictional climate finance.
- Experience in Latin America (experience in Africa and Asia-Pacific will be considered an advantage).

Expected Competencies:

- Technical expertise and analytical capacity to conduct critical and comparative analysis of complex issues.
- Experience compiling and analyzing quantitative and qualitative data.
- Experience conducting multi-stakeholder interviews, with intercultural sensitivity, active listening, and clear communication.
- Ability to work independently, meet deadlines, and incorporate consolidated feedback. Essential competencies include the ability to conduct critical and comparative analyses of complex issues, experience compiling and analyzing quantitative and qualitative data, experience conducting interviews with multiple stakeholders, proficiency in English, the ability to communicate technical findings clearly to different audiences, and the ability to work autonomously while meeting deadlines and incorporating consolidated feedback.



9. Payment

Payment for the consultancy will be made per deliverable, upon formal approval of each product described in these Terms of Reference. After approval of the respective deliverable, the consultant must issue the corresponding invoice, and payment will be processed in United States dollars (USD) in accordance with Forest Trends administrative procedures. The consultant must have banking capacity to receive international payments (if not from the US) and will be responsible for exchange rate variations, taxes, and any required insurance. Expenses related to travel or in-person activities are not included. Advance payments will not be made. The agreed amounts will include all costs associated with the execution of the consultancy.

10. Submission of Proposals

- Proposals must be sent by email to: ctgi@forest-trends.org.
- Subject line: "Technical Proposal for Consultancy – 01/2026".
- Submission deadline: **March 18, 2026**.
- Any questions should be sent to the same email addresses within the proposal submission deadline.

ANNEX 1 – Methodological Components and Detailed Description of Deliverables

The development of the Principles shall adopt a participatory and evidence-based approach, aligned with relevant normative frameworks and international standards, including, among others:

- ART (Architecture for REDD+ Transactions)
- ICVCM – Core Carbon Principles
- Socio-environmental safeguards applicable to REDD+ and climate finance
- Guidelines and practices related to Free, Prior and Informed Consent (FPIC)
- Relevant institutional experiences, including for example:
 - CONAREDD+ (Brazil)
 - ENAREDD+ (Mexico)
 - Jurisdictional governance arrangements in Latin America, Asia-Pacific and Africa
 - Multi-stakeholder participatory arrangements and benefit-sharing mechanisms

Other technical and institutional references may be incorporated upon validation with CTGI team.

A. Work Plan and Methodology

Objective: to establish the methodological approach, participatory strategy, and implementation planning.

Minimum content:

- Detailed methodological approach for the development of the Principles.
- Preliminary technical and normative references.
- Strategy for engaging key stakeholders.
- Methods for collecting, systematizing, and validating contributions.
- Indicative timeline aligned with this Terms of Reference.

B. Guiding Document for the Development of the Principles

Objective: to consolidate the conceptual and methodological basis for the participatory development of the Principles.

Minimum content:

- Conceptual introduction and contextualization of the topic.
- Systematization of relevant technical and normative references.
- Mapping of key stakeholders (governments, representative organizations, funders, civil society, international jurisdictional bodies and/or actors from Latin America, Asia-Pacific and Africa).

- Preliminary conceptual structure of the Principles (axes, logic, and approach).
- Participatory methodology for listening processes, gathering contributions, and validation.

C. Preliminary Version of the Principles

Objective: to present the first consolidated version of the Principles based on the consultations conducted.

Minimum content:

- Conceptual structure validated internally.
- Implementation of listening sessions and technical consultations with key stakeholders.
- Preliminary systematization of contributions received.
- Initial practical implications for governments and institutional actors.

D. Revised Version of the Principles and Validation Report

Objective: to revise the Principles based on contributions from key stakeholders and document the validation process.

Minimum content:

- Revised version of the Principles incorporating consolidated contributions.
- Description of the review and validation process.
- Summary of contributions received.
- Summary matrix indicating incorporation of comments or justification for non-incorporation.
- Record of consensus points, divergences, and key issues requiring attention.

E. Validated Version of the Principles

Objective: to present a consolidated version ready for final review and preparation for publication.

Minimum content:

- Consolidated Principles document.
- Organization of publication elements (figures, tables, diagrams, etc.).
- Verification of conceptual consistency and alignment with international standards.

F. Final Version of the Principles

Objective: to deliver the final version revised and approved for publication.

Minimum content:

- Final consolidated document.
- Incorporation of final comments from CTGI and strategic partners.
- Technical review and standardization of references.

G. Recommendations Document for Pilot Application

Objective: to guide CTGI's team in the practical application of the Principles, following the completion of this consultancy, in pilot jurisdictional contexts.

Minimum content:

- Systematization of lessons learned from the process.
- Matrix of challenges and opportunities for pilot implementation.
- Technical recommendations for adoption, application, and future improvement.

H. Documentary Base and Technical Annexes

Objective: to ensure methodological transparency and traceability of information.

Minimum content:

- Bibliographic references used.
- Matrices of contributions and technical inputs collected.
- Systematized records of consultations and dialogues.
- Final and editable versions of the deliverables.

I. Occasional Participation in Dissemination Activities

Objective: to support the dissemination and presentation of the Principles. Participation will occur upon request and prior agreement between the parties.

Possible activities:

- Support and participation in technical and strategic meetings.
- Support for webinars and launch events.
- Presentation of results to different audiences.