

Request for Proposals
Curriculum content development
Climate Finance Access Network (CFAN) Advisor Training Program

This RFP was modified on March 12, 2021 to include an appendix with RMI's responses to bidders' requests for clarification. Requests for clarification have been anonymized and edited for clarity.

I. Project Overview

In its role as Network Coordinator to the Climate Finance Access Network (CFAN), RMI, a Colorado nonprofit corporation, seeks a reputable and experienced Firm to support curriculum content development of CFAN's Advisor Training program ("Training"), a multi-week technical training program for international climate finance advisors. The scope of work described below builds on an existing market survey of climate finance trainings/workshops and will fulfil an existing framework developed in consultation with nearly 40 initiatives working on global climate finance and capacity building.

Please note: this Project is grant funded, and the award is contingent on funding availability.

II. Project Background

Through a network of donors, member initiatives, and countries, CFAN was established to alleviate the challenge faced by developing countries in accessing climate finance to achieve their climate goals. By cultivating a network of highly trained and embedded in-country climate finance advisors, CFAN builds the capacity of developing countries to secure and structure finance for climate investments. After attending CFAN's multi-week, cohort-based training program, CFAN Advisors ("Advisors") are placed in relevant government offices (e.g., ministries of finance or ministries of the environment) to support and build capacity in Least Developed Countries (LDCs) and Small Island Developing States (SIDS) in Africa, the Caribbean, and the Pacific to access and structure climate finance.

RMI is initially serving as CFAN's Network Coordinator. RMI is an independent non-profit with a 36-year track record of advancing market-based solutions to climate change. Today, the organization has a staff of over 270 scientists, engineers, and business leaders who have helped governments, utilities, multinational companies, innovative startups, and communities understand and benefit from the new energy economy with the imaginative application of rigorous technical and economic analysis. RMI has over three decades of experience working in the US, and over the last decade added international experience as a core capacity—in China, India, the Caribbean Islands, sub-Saharan Africa, and southeast Asia.

III. Project Details

As Network Coordinator, RMI is overseeing development of the Training. The Contractor selected through this RFP will develop and deliver curriculum content for the Training under RMI's management and, if relevant, in collaboration with any other Contractor(s).

The Training is a cohort-based, multi-week, rigorous and technical program for CFAN's inaugural cohort of 15-30 newly hired Advisors. The Training is envisioned as highly interactive and participatory to promote peer-to-peer learning across the Advisor cohort, and as a highly focused and comprehensive

deep dive to complement and enhance the existing expertise of Advisors. The objective is to ensure Advisors are well-rounded in their knowledge and skillsets, and that they are prepared for success delivering on their mandates to secure and structure finance for investment in mitigation and adaptation projects on behalf of the respective countries where they will work.

At a high-level, the goals of the Training are for Advisors to develop:

1. Expertise on climate finance sources and instruments
2. Practical deliverables, including workplans to support their work in-country
3. Relationships with climate finance providers

The inaugural Training is likely to commence between August and October 2021 and will be held virtually. The Training content and structure should be developed in such a way that it may be easily translated for in-person delivery of subsequent trainings.

IV. Scope of Work: Training Tasks

The Contractor selected through this RFP will be responsible for developing the Training’s curriculum. The Training includes six Tasks. Task 1 is design of a country assignment for advisors to complete independently prior to the training, and Tasks 2-6 are design of cohort-based, classroom-style Training Modules.

Tasks 1. Independent country assignment for Africa, the Pacific, and the Caribbean

Objectives and scope of work:

- Design a regional strategy for independent country assignments that Advisors will complete prior to the Training Modules (Tasks 2-6). Independent country assignments are intended as a guided introduction for Advisors to the specific country context where they will be placed.
- Sample topics for the independent country assignments are listed in Table 1.
- Independent country assignments should be designed to take each Advisor approximately 20-40 hours.

Primary deliverables:

- A written guide providing the content and format of independent country assignments at the regional level, including a plan for tailoring the strategy to countries where Advisors may be deployed.
- Materials and resources to support Advisors in completing the independent assignment. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 1. Country Assignment Topics

Topics	Description
Policy framework	<ul style="list-style-type: none"> • National climate change strategies and investment plans • National policies and legal provisions relevant to securing climate finance
National stakeholders & institutions	<ul style="list-style-type: none"> • Division of responsibilities between institutions, departments, and individuals within host country

	<ul style="list-style-type: none"> National stakeholders important to engage for funding proposals and capacity-building
Financial & macroeconomic context	<ul style="list-style-type: none"> Debt ceilings, creditworthiness, currency risk, climate-related budget practices
Climate finance precedent	<ul style="list-style-type: none"> Status of national climate finance flows Trends in private sector engagement Local, national, and regional capacity-building efforts and/or climate finance initiatives

Task 2. Module 1: International climate finance foundations & trends.

Objectives and scope of work:

- Design a curriculum and develop content for a cohort-based Training Module on international climate finance foundations and trends.
- Module 1 should provide Advisors with a foundational understanding of international climate finance policies and regimes on which subsequent Training Modules will build.
- Sample topics for Module 1 are listed in Table 2.

Primary deliverables:

- Comprehensive Training Module with approximately 8 hours of curriculum content.
- Strategy for delivering training sessions to users of the virtual platform.
- Training materials and resources. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 2. Module 1 Topics

Topics	Description
Climate finance fundamentals	<ul style="list-style-type: none"> Trends in global climate finance flows and markets Role of public, private, and country action on global commitments Political history, important milestones, key terms
Climate targets & policies	<ul style="list-style-type: none"> NDCs, NAPs, NAMAs, NAPAs, SDGs Implications of climate targets for accessing and securing finance at the country level
International stakeholders & institutions	<ul style="list-style-type: none"> Climate finance intermediaries and market facilitators Implementing agencies, accredited agencies, and executing entities

Task 3. Module 2: Climate finance sources & proposal processes.

Objectives and scope of work:

- Design a curriculum and develop content for a cohort-based Training Module on the range of funding sources available for climate investment.
- Module 2 should prepare Advisors to navigate the highly complex international climate finance landscape and prioritize funding targets, including knowing when and how to access each.
- Sample topics for Module 2 are listed in Table 3.

Primary deliverables:

- Comprehensive Training Module with approximately 40 hours of curriculum content.
- Strategy for delivering training sessions to users of the virtual platform.

- Training materials and resources. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 3. Module 2 Topics

Topics	Description
Climate finance flows	<ul style="list-style-type: none"> • Financial mechanisms and resources provided by international and domestic as well as public and private finance providers
Donor priorities	<ul style="list-style-type: none"> • Matching sources of finance to project needs • Priorities of various climate finance providers • Perspectives on bankability across funders
Proposal inputs & processes	<ul style="list-style-type: none"> • Proposal requirements and processes for international public finance providers (e.g., funding windows, application steps, concept notes, log frames) • Understanding non-financial proposal requirements (e.g., environmental and social safeguards, gender assessments, aligning interventions with government priorities, contracting and permitting)

Task 4. Module 3: Climate finance instruments & financial structuring

Objectives and scope of work:

- Design a curriculum and develop content for a cohort-based Training Module on financial instruments and structuring strategies.
- Module 3 should equip Advisors with practical tools to cultivate bankable projects through keen risk identification and financial structuring.
- Sample topics for Module 3 are listed in Table 4.

Primary deliverables:

- Comprehensive Training Module with approximately 48 hours of curriculum content.
- Strategy for delivering training sessions to users of the virtual platform.
- Training materials and resources. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 4. Module 3 Topics

Topics	Description
Climate finance instruments	<ul style="list-style-type: none"> • Instrument features and applications
Project finance & financial structuring	<ul style="list-style-type: none"> • Project finance terms and concepts (e.g., project development phases, coverage ratios, risk allocations and contractual structures)
Risk & risk mitigation	<ul style="list-style-type: none"> • Risk identification in climate projects and/or developing economies • Financial arrangements and mechanisms to address risks
Private sector leveraging & engagement	<ul style="list-style-type: none"> • “Making the business case” and leveraging private capital • Legal aspects of deal structuring, including negotiations, permitting and procurement

Task 5. Module 4: Sectoral expertise.

Objectives and scope of work:

- Design a curriculum and develop content for a cohort-based Training Module on sector-specific material, including sectoral funding opportunities and financing instruments.
- Module 4 should provide Advisors with sector-specific expertise on financing strategies and opportunities.
- Sample topics for Module 4 are listed in Table 5.

Primary deliverables:

- Comprehensive Training Module with approximately 24 hours of curriculum content, including approximately 4-8 hours of content per sector listed in Table 5.
- Strategy for delivering training sessions to users of the virtual platform.
- Training materials and resources. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 5. Module 4 Topics

Topics	Sample topics
Agriculture	<ul style="list-style-type: none"> • Climate smart lending • Index insurance • Risk insurance pools
Energy	<ul style="list-style-type: none"> • Off-takers and PPAs • Power markets • Procurements • Integrated Resource Plans
Oceans & coasts	<ul style="list-style-type: none"> • Ocean Risk insurance • Payments for Ecosystem Services (PES)
Water	<ul style="list-style-type: none"> • Blue bonds • Payments for Ecosystem Services (PES) • Natural capital

Task 6. Module 5: Communication & facilitation.

Objectives and scope of work:

- Design a curriculum and develop content for a cohort-based Training Module on fundamentals of communication and engagement.
- Module 5 should equip ensure credibility and efficacy in the Advisor role through facilitation practice and strategies to support their capacity-building and stakeholder engagement in-country.
- Sample topics for Module 5 are listed in Table 6.

Primary deliverables:

- Comprehensive Training Module with approximately 8 hours of curriculum content.
- Strategy for delivering training sessions to users of the virtual platform.
- Training materials and resources. Wherever possible, existing materials, content, and/or best practices should be adopted and employed.

Table 6. Module 5 Topics

Topics	Description
Multi-stakeholder processes	<ul style="list-style-type: none">• Navigating political processes, managing conflicting interests
Communicating with different audiences	<ul style="list-style-type: none">• Packaging messaging to different audiences
Training-the-trainers	<ul style="list-style-type: none">• Preparation for leading capacity building efforts with civil servants in country

V. Deliverables

The Contractor selected through this RFP will provide a set of deliverables developed with ongoing feedback from RMI, at regular intervals to be specified in the contract. Deliverables may include, but are not limited to:

- Bi-weekly, one-hour calls with RMI
- Interim deliverables (e.g., proposed curriculum, training material drafts, etc.)
- Two 2-hour design meetings, to be held via videoconference with all Contractor(s) and RMI staff
- Primary Task deliverables (see Section IV) (e.g., final curriculum, supporting materials and resources, etc.)
- End-of-project report on individual scope of work for RMI
- Others as appropriate

VI. Proposal Instructions

Proposals should be submitted for all Tasks, but RMI reserves the right to award contract(s) for any subset of Tasks.

Please include the following with your Proposal:

1. Firm's name, address, primary point of contact, overview of the Firm's background, and description of interest.
2. For each Task, an overview of how the Firm will approach the Task(s), including a detailed methodology, description of expected deliverables, and work plan with process approaches and deliverable dates for meeting each Task's objectives as described. Please identify who would participate in the work for each Task.
3. Financial bid in USD, including a detailed cost breakdown per Task and a proposed payment schedule, preferably linked to the following outputs:
 - Signing the contract and submission of a blueprint including work-plan and methodology for the assignment.
 - Delivery of interim deliverables.
 - Delivery of finalized training materials.
 - Delivery of any end-of-project report or evaluations.

Proposals may be submitted on behalf of a consortium of Firms and/or consultants. Proposals submitted on behalf of a consortium of entities should clearly designate one lead Firm to whom the contract will be awarded and who will be responsible for sub-contracting.

VII. Evaluation & Selection

Minimum requirements and qualifications

Applicants to this RFP are expected to have the following qualifications and experience:

- Demonstrated knowledge and working experience designing training modules, curriculum, and/or training content.
- In depth understanding of international climate finance concepts, including knowledge of key stakeholders/actors and networks in LDCs and SIDS.
- Experience applying gender sensitive principles to curriculum development processes and deliverables.
- Demonstrated experience and ability to work successfully with a cross-section of stakeholder groups from different professional and cultural backgrounds.
- Fluency in English.

Evaluation criteria

Proposals will be evaluated and determined by the following primary evaluation categories:

- **Firm qualifications and expertise.** Including a proven track record of experience providing relevant services and/or content and demonstrated knowledge on the topics.
- **Proposal clarity and strength.** Including robustness of the proposed methodology, conceptual framework, and work plan.
- **Diversity, equity, and inclusion.** Integration of human rights and gender equity considerations in the proposed methodology and deliverables.
- **Price competitiveness**

Selection and Contracting process

RMI may select a Contractor offering best value without discussions. However, RMI also reserves the right to seek clarifications and to negotiate with any applicants having submitted a competitive Proposal. RMI reserves the right to award one or more contracts under this RFP, including multiple contracts for each Task, to a single or multiple Contractor(s), or to make no awards, in RMI's sole discretion.

A contract will be developed in negotiation with any awarded Contractor. The contract term will begin at the time of execution and conclude after the completion of the Training. All intellectual property developed through this solicitation will be owned and copyrighted to CFAN.

VIII. Proposal Submission

Please send your Proposal by electronic mail with the subject "CFAN Advisor Training Proposal [FIRM NAME]" to info@cfanadvisors.org and wmann@rmi.org.

Table 7. RFP Timetable

Milestone	Date
RFP released	February 16, 2021

Deadline to submit requests for clarification to RMI	March 9, 2021
Final responses to request for clarification issued	March 12, 2021
Proposal submission deadline*	March 23, 2021
Interviews with shortlisted applicants complete	April 20, 2021
Contracts awarded	May 4, 2021**

* Submissions will be reviewed on a rolling basis.

**This Project is grant funded, and the award is contingent on funding availability.

Appendix: Responses to Requests for Clarification

This appendix includes RMI's responses to requests for clarification. Requests to clarification have been anonymized and edited for clarity.

1.	What is the expected budget for this RFP?	RMI is not disclosing its budget. Firms seeking guidance on the budget may submit their proposed total budget or a budget range to RMI ahead of the deadline for submissions and RMI will indicate whether this budget is within range.
2.	Will the inaugural virtual training be held live, or can the training also be online?	The inaugural virtual training will be held live. Please note, as stated in the RFP, that "the Training content and structure should be developed in such a way that it may be easily translated for in-person delivery of subsequent trainings."
3.	Which virtual platform will be used to deliver the inaugural training?	RMI has not selected a virtual platform, and firms may suggest their own learning platform as part of the proposal. A primary deliverable for Tasks 2-6 is a "strategy for delivering training sessions to users of the virtual platform".
4.	Who will be teaching or facilitating the training developed through this RFP?	Contractor(s) selected through this RFP will not be expected to deliver the training. RMI has not yet identified training facilitators or trainers, nor has RMI determined whether trainers will be hired through competitive procurement.
5.	What is required from the "post-training report" deliverable (Section V)?	RMI has replaced "post-training report" with "end-of-project report" in Section V "Deliverables" and Section VI "Proposal Instructions". This report should be delivered following completion of all other deliverables related to this RFP and design of the training. Contractor(s) selected through the RFP are not expected to participate and/or audit the Training to inform the end-of-project report. Rather, the report is anticipated to include topics such as a description of the approaches and methodologies used to develop any materials delivered through this RFP, as well as challenges and lessons learned in the process.
6.	What is expected for the "others as appropriate" deliverable (Section V)?	RMI has intentionally left this open-ended. In addition to the "primary deliverables" listed per Task, RMI is interested in any additional proposed deliverables based on each Applicant's vision for delivering each Task. Section VI, "Proposal Instructions", asks that Proposals include, "for each Task, an overview of how the Firm will approach the Task(s), including a detailed methodology, description of expected deliverables, and work plan with process approaches and deliverable dates for meeting each Task's objectives as described." A more precise set of deliverables will be established through contract negotiations.

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7.	Should proposals be submitted for all tasks?	Yes, proposals should cover all tasks. However, RMI reserves the right to award one or more contracts for any subset(s) of tasks, or to make no awards, in RMI's sole discretion.
8.	By when are all deliverables expected to be finalized?	As stated in the RFP, "the inaugural Training is likely to commence between August and October 2021". Preference will be given to applicants who can finalize deliverables by August 2021. More precise deliverable dates will be established through contract negotiations.
9.	For Task 1, "Independent country assignment for Africa, the Pacific, and the Caribbean", should applicants propose a selection of countries for which an assignment will be designed?	The expectation for Task 1, at a minimum, is that three regional strategies (one for Africa, one for the Caribbean, and one for the Pacific) will be developed from which independent country assignments can be tailored for any country where a CFAN advisor might work. Deliverables for this task should therefore not be restricted to a selection of countries.
10.	May proposals be submitted on behalf of a consortium or partnership of firms?	Yes. As stated in the RFP, "Proposals may be submitted on behalf of a consortium of Firms and/or consultants. Proposals submitted on behalf of a consortium of entities should clearly designate one lead Firm to whom the contract will be awarded and who will be responsible for sub-contracting."