

**Inter-American Biodiversity Information Network (IABIN)  
Executive Committee**

**REQUEST FOR Proposals  
for the Selection of a Coordinating Institution (CI) for the IABIN  
Pollinators Thematic Network (IABIN Pollinators TN)**

**IABIN Background and Overview**

Responding to the importance in the Americas of protection of biodiversity (the Americas houses 8 of the world's 25 biodiversity hotspots<sup>1</sup>), the Inter-American Biodiversity Information Network (IABIN) was officially mandated at the Summit of the Americas on Sustainable Development, convened by the Organization of American States (OAS) in Santa Cruz de la Sierra, Bolivia, in December 1996. IABIN is an Internet-based forum for technical and scientific cooperation that seeks to promote greater coordination among Western Hemisphere countries in the collection, sharing, and use of biodiversity information relevant to decision-making and education.

The objective of IABIN is to promote sustainable development and the conservation and sustainable use of biological diversity in the Americas through better access to and management of biological information. While IABIN is envisioned as a distributed system of data providers in which the data are maintained and controlled by the provider, coordinated access to the integrated resources of the network is a key component of IABIN.

IABIN is governed by the IABIN Council, comprising official Focal Points from the countries of the Americas and representatives from intergovernmental and non-governmental organizations and initiatives addressing biodiversity informatics issues. The IABIN Council is represented inter-sessionally by the IABIN Executive Committee (IEC), comprised of the IABIN Council Chair and Vice-Chair, 6 members elected from among the official IABIN Focal Points and one elected representative from an inter- or non-governmental organization.

Since IABIN's inception in 1996, 34 countries have designated official IABIN Focal Points. Four IABIN Council meetings have been held with the IABIN Focal Points and a broad representation from the international, NGO, and private sector communities.

The IABIN Secretariat manages day-to-day activities of IABIN. The IEC has chosen the City of Knowledge in Panama City, an NGO, as the Host organization for the IABIN Secretariat.

The Project Implementation Plan (PIP) found on <http://www.iabin.net> outlines a US\$35 million plan. A five year Global Environment Facility (GEF) Grant of US\$6.0 million for the "Building the Inter-American Biodiversity Information Network (IABIN)" Project is executed by the General Secretariat of the OAS (GS/OAS) and implemented by the International Bank

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<sup>1</sup> Myers N, Mittermeier RA, Mittermeier CG, da Fonseca GAB, Kent J. 2000. Biodiversity hotspots for conservation priorities. *Nature* 403 (6772): 853-858 (Feb 24).

for Reconstruction and Development (World Bank). Co-financing for the GEF project in the amount of approximately US\$28.9 million, thus totaling close to US\$35 million, has been identified from 76 regional or national institutions and programs.

The overall project will:

- (i) Develop an Internet-based, decentralized managed network to provide access to scientifically credible biodiversity information currently existing in individual institutions and agencies in the Americas,
- (ii) Provide the tools necessary to draw knowledge from that wealth of resources, which in turn will support sound decision-making concerning the conservation of biodiversity,
- (iii) Provide a mechanism in the Americas to exchange information relevant to conservation and sustainable use of biological diversity, thus promoting and facilitating technical and scientific cooperation to help fulfill the mandate of the Clearing-House Mechanism of the Convention on Biological Diversity.

### **Services Required**

IABIN requires the Selection of a Coordinating Institution (CI) for the IABIN Pollinators Thematic Network (IABIN PTN). The IABIN PTN should bridge current local, national, sub-regional, and regional efforts to make recommendations on what research and monitoring are needed to provide improved information, and on any conservation or restoration steps that can be taken to slow or reverse potential decline or to avoid future decline of pollinators.

Tools developed by the Network should allow the users to consult pollinator's databases in an integrated manner and in coordination with other IABIN Thematic Networks to improve information accessibility on this particular group of species. Coordinating Institutions may be located in North America, Central America, South America and the Caribbean. It is likely that a CI of a network would work collaboratively with a network of other major organizations in order to implement the TN. As IABIN is about facilitating partnerships, organizations may choose to form a consortium in order to improve technical expertise or geographic coverage. Any organization that is not a lead member of a consortium may be part of more than one consortium sending in a proposal.

In addition to the services required for the Selection of a Coordinating Institution (CI) for the IABIN Pollinators Thematic Network (IABIN PTN), organizations are strongly encouraged to consult the Project Implementation Plan (PIP) found on <http://www.iabin.net>, where information on the general project and the relationship of the IABIN PTN to other Thematic Networks and other IABIN components is provided.

### **Objectives**

1. Enhance the usefulness of pollinator information for decision makers in government and civil society.
2. Protect threatened and endangered pollinator species and their habitat by collaborating with scientists, organizations, and countries to develop information needed to protect threatened species and promote in-country implementation of successful recovery plans.
3. Establish participatory mechanisms to work with IABIN Focal Points and local, national, and regional partners in the implementation of the IABIN Pollinators Thematic Network.

4. Evaluate and begin implementing the standards and protocols needed to guide the development and sharing of pollinator information that is distributed among different institutions of the region. Standards should consider associated information such as natural history, indicators, distribution, and management. This should also take into account pre-existing standards that may be applicable to the pollinator issue, rather than creating new duplicative standards.
5. Develop the technical infrastructure (hardware, software, capacity building) to create and implement an information system to disseminate pollinator information not currently available, or presently managed within incompatible systems.
6. Integrate pollinator information with specimen, species, ecosystem, and protected areas information from other IABIN thematic networks.
7. Integrate the IABIN Pollinators Thematic Network with regional and global pollinator initiatives
8. Maintain the IABIN Pollinators Thematic Network.

### **Deadline for Submittal of RfP**

The IEC has requested that the IABIN Secretariat and the General Secretariat of the Organization of American States (GS/OAS) manage the process of soliciting RfPs and managing the selection process, which however will remain under the authority of the IEC. The GS/OAS is the designated diplomatic host of IABIN and also manages an ongoing World Bank/GEF Project in support of IABIN, under which it is expected that future funding will be available to support the PTN (in the form of a grant to the chosen CI).

Proposals must be received by **Monday March 6, 2006**

and should be addressed to Mr. Iván Valdespino, IABIN Secretariat Director ([ivaldespino@iabin.net](mailto:ivaldespino@iabin.net)) and copied to Mr. Richard Huber, Principal Environmental Specialist at the OAS ([rhuber@oas.org](mailto:rhuber@oas.org)).

### **Information to be included in the proposals**

Proposals should include information on the organization's experience and competence relevant to the assignment, relevant technical experience of the firms and staff in becoming the Coordinating Institution of the Pollinators Thematic Network, general academic qualifications of firm's staff, capacity to develop tasks in the different IABIN sub-regions (sub-regional representation), knowledge and capacity to manage activities in IABIN's official languages, capacity to engage IABIN National Focal Points and local and national organizations that are IABIN's partners in the planning process and development of the Pollinators Network, and proved capacity to establish collaboration with similar organizations based on the potential to complement each other and leverage additional resources, which will allow a Technical Selection Committee to establish a short list of organizations with the most appropriate qualifications and references.

A Technical Selection Committee has been formed with members of the IEC (IABIN Executive Committee), IABIN Secretariat, and the GS/OAS. Once the Proposals are received, the most qualified firms will be short listed and requested to submit detailed proposals.

### **Process for Choosing the Coordinating Institution (CI):**

1. The IABIN Secretariat, with the IABIN Executive Committee (IEC) input, prepares a request for Expression of Interest from organizations (firms, NGOs, academic

institutions) interested in becoming the Coordinating Institution of the IABIN Pollinators Thematic Network.

2. A Technical Selection Committee formed with members of the IEC (IABIN Executive Committee), IABIN Secretariat, and the GS/OAS evaluates the EoIs and establishes a short list of the most qualified firms.
3. A Request for Proposals (RFP) for the Selection of the CI and establishment of the PTN, including Terms of Reference (TORs), detailing the activities of the IABIN PTN is sent to the short-listed firms.
4. Proposals are evaluated by the Technical Selection Committee and a firm is selected for becoming the IABIN PTN Coordinating Institution.
5. A Memorandum of Cooperation is signed between the newly selected CI and the IEC. Concurrently with Step 5, the newly selected CI and the GS/OAS<sup>2</sup> begin negotiations on a “Coordinating Institutions Transfer Agreement” to be signed between the CI and the GS/OAS, for the execution of the “Building IABIN” GEF Projects funds allocated for the IABIN PTN<sup>3</sup>. Under this agreement, the CI would become a partner with the OAS in the execution of the project and thus would be subject to the provisions of the Grant Agreement that has been signed between the OAS and the World Bank for the GEF Project.
6. A “Coordinating Institutions Transfer Agreement” is signed between the CI and the GS/OAS as the Executing Agency. The “Coordinating Institutions Transfer Agreement” will stipulate the work and products the CI will be expected to deliver, the cofinancing that it will provide (at least a 2:1 match to the amount of the grant), and the financial arrangements of the Grant.
7. Prior to signature, the “Coordinating Institutions Transfer Agreement” is subject to World Bank no-objection, as defined in the World Bank/ GS/OAS legal agreement.
8. Upon successful negotiations, the CI and OAS sign the “Coordinating Institutions Transfer Agreement”<sup>4</sup>.

Note that Government-owned enterprises may participate only if they can establish that they (i) are legally and financially autonomous and (ii) operate under commercial law.

## Evaluation Criteria

The number of points to be given under each of the evaluation criteria for the technical proposal are:

|   | <u>Points</u> |
|---|---------------|
| (i) Specific geographic and technical experience of the consortium related to the assignment  | [10]          |
| <i>[Preferred core areas: Biodiversity/Environment and development of informatics system]</i> |               |

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<sup>2</sup> The Organization of American States is the Executing Agency for the World Bank/GEF “Building IABIN” GEF Project.

<sup>3</sup> The RFP will also include information on the requirements for the execution of the “Building IABIN” GEF Projects funds allocated for the IABIN PTN. The co-executing grant agreement to be signed between the CI and the GS/OAS will govern the use of such resources. The overall 3 year budget for GEF IABIN funds for the IABIN PTN is US\$180,000 with a co-financing requirement of US\$360,000. Direct investments of GEF project funds (providing training, paying for travel, etc.) is limited to countries that meet all of the following criteria: i) OAS-eligible Countries; i) GEF-eligible (e.g. Countries that have sent in the letter endorsing the GEF IABIN Project). Firms from Countries that have not endorsed the GEF project may complete Proposals.

[Related areas: GS/OAS work, both analytical work and implementation, experience in the Region ]

(ii) Adequacy and level of innovation of the proposed work plan and monitoring time-bound quantitative performance indicators, and methodology in responding to the Terms of Reference [50]

(iii) Qualifications and competence of the key staff and geographic and technical depth of the Consortium for the Assignment

[40]

Within this criterion, we will use the following sub criteria for qualifications of staff:

|  | <u>Points</u> |
|--|---------------|
| (i) General academic qualifications                    | [30]          |
| (ii) Pertinent geographic and technical experience     | [60]          |
| (iii) Experience and partnerships in region & language | [10]          |

Total Points: 100

**Total Points: 100**

The minimum technical score required to pass [*Insert number of points*]:  
65

**Publication Date: November February 8, 2006**  
**Proposals must be received by Monday March 6, 2006**

**Questions regarding this Request for RfP may be directed to the contacts below no later than a week before deadline for submittal of Proposals.**

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# **TERMS OF REFERENCE (TORS) FOR THE ESTABLISHMENT OF A COORDINATING INSTITUTION (CI) FOR THE IABIN POLLINATORS THEMATIC NETWORK (IABIN PTN)**

**IMPLEMENTING AGENCY:** WORLD BANK  
**EXECUTING ORGANIZATION:** GENERAL SECRETARIAT / ORGANIZATION OF AMERICAN STATES (OAS)  
**PROJECT:** “BUILDING THE INTER-AMERICAN BIODIVERSITY INFORMATION NETWORK” (IABIN) P077187 - TF 053526

**ORIGINAL LANGUAGE:** ENGLISH  
**DURATION:** THREE (3) YEARS

## **1. Background**

It is recommended to review the Project Implementation Plan (PIP) found at <http://www.iabin.net>, both in English and Spanish, where most of the information on the IABIN PTN, and its inception and interaction with the other IABIN Thematic Networks (TNs) and other project components is provided. It is also recommended to review Annex 1 (Tracking Counterpart Funding) of this TORs.

One of the most critical technological aspects to be implemented within the establishment of IABIN PTN is to ensure interoperability and provide access to providers and users. The IABIN PTN will assist the biodiversity informatics users and providers to access or provide information regarding pollinators, their conservation status, threats and conservation measures.

The following terms of reference (TORs) address the requirements laid out by the IABIN Council and the PIP for the “Establishment of a Coordinating Institution (CI) for the IABIN Pollinators Thematic Network (IABIN PTN)” and its associated components, taking advantage of current national, sub-regional, and regional initiatives.

## **2. Justification**

More than 218,000 of the world’s 250,000 flowering plants, including 80% of the world’s species of food plants, rely on pollinators for reproduction<sup>5</sup>. The actions of pollinators ensure maintenance of genetic variability that plant populations need to survive and continue to evolve, and to produce most fruits and vegetables.

There are hundreds of thousands of pollinators such as bees, butterflies, beetles, flies, wasps, ants, birds, and bats (and other less known mammals). They play a unique and important role not only in ensuring reproduction and species survival mechanisms that take place in natural ecosystems, making them sustainable, but also they are a key component of productivity in

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<sup>5</sup> Emblidge, A., and E. Schuster. 1999. Saving pollinators. *Zoogoer* 28(1):11-15.  
Buchmann, S.L. and G.P. Nabhan. 1996. *The Forgotten Pollinators*. Island Press, Washington, D.C.

most managed ones. Effective pollination therefore assures the availability of food for human consumption and the strength of most of the world's rural economies.

According to the U.S. Department of Agriculture, there is an "impending pollination crisis," in which both wild and managed pollinators are disappearing at alarming rates<sup>6</sup>.

For over a decade, biologists have been concerned about apparent declines in pollinators, especially those that migrate between regions, and the concomitant declines in seed production of flowering plants. This concern over plant-pollinator interactions has contributed to a paradigm shift from protecting individual species to protecting inter-specific relationships and landscape-level ecological processes. While an awareness of these relationships and processes is not new to conservation biology, the recent attention given to these topics by resource managers, policy-makers, environmental educators, and the press has been unprecedented<sup>7</sup>.

In order to understand current threats to pollinators survival and the consequences these pose to humankind it is key to have basic information available on identification of threats, document and evaluate pollinator populations and communities, evaluate impact of resource management practices on pollinators, evaluate impact of resource management practices on pollinators, and increase understanding of socio-economic issues related to pollinators among other. However, biodiversity information on pollinators is scattered and often unavailable, thus hindering the availability of reliable information to study these species and design environmental policies for their conservation and proper management. This is of concern, as this information should also be used to estimate the value of environmental services pollinators produce that contribute to the wellbeing of humans and, thus, highlight the need to conserve the natural areas in which they expend part of their life cycle. In addition, this information could be used to determine the causes of pollinator's decline, including the indiscriminate use of pesticides, such as insecticides and herbicides, reduced availability of nectar, parasites, destruction of habitat along migratory corridors, modern agricultural practices, grazing, and invasive species<sup>8</sup>, and the protection measures that are needed to ensure their survival.

### **3. Goals of the IABIN Pollinators Thematic Network (IABIN PTN)**

The goal of this Thematic Network is to implement an electronic and institutional network dedicated to information on pollinators of the Americas to facilitate the integration of biological, ecological and agricultural information related to pollinators, in an efficient retrieval system.

The IABIN PTN should also bridge current local, national, sub-regional, and regional efforts to make recommendations on what research and monitoring are needed to provide improved information, and on any conservation or restoration steps that can be taken to slow or reverse potential decline or to avoid future decline of pollinators.

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<sup>6</sup> USDA-ARS. 1991. Pollination Workshop Proceedings. unpublished, Denver, CO.

<sup>7</sup> (<http://www.desertmuseum.org/pollination/introduction.html>).

<sup>8</sup> Nabhan GP. -1996. *Pollinator Redbook. Vol. 1: Global List of Threatened Vertebrate Wildlife Species Serving as Pollinators for Crops and Wild Plants*. Tucson, AZ: Arizona-Sonora Desert Mus. & Forogr. Pollinat. Camp. Monogr.

Kearns, C.A., D.W. Inouye, and N.M. Waser. 1998. Endangered mutualisms: the conservation of plant-pollinator interactions. *Annu. Rev. Ecol. Syst.* 29: 83-112.

Tools developed by the Network should allow the users to consult pollinator’s databases in an integrated manner and in coordination with other IABIN Thematic Networks to improve information accessibility on this particular group of species.

**4. Objectives**

1. Enhance the usefulness of pollinator information for decision makers in government and civil society.
2. Protect threatened and endangered pollinator species and their habitat by collaborating with scientists, organizations, and countries to develop information needed to protect threatened species and promote in-country implementation of successful recovery plans.
3. Establish participatory mechanisms to work with IABIN Focal Points and local, national, and regional partners in the implementation of the IABIN Pollinators Thematic Network.
4. Evaluate and begin implementing the standards and protocols needed to guide the development and sharing of pollinator information that is distributed among different institutions of the region. Standards should consider associated information such as natural history, indicators, distribution, and management. This should also take into account pre-existing standards that may be applicable to the pollinator issue, rather than creating new duplicative standards.
5. Develop the technical infrastructure (hardware, software, capacity building) to create and implement an information system to disseminate pollinator information not currently available, or presently managed within incompatible systems.
6. Integrate pollinator information with specimen, species, ecosystem, and protected areas information from other IABIN thematic networks.
7. Integrate the IABIN Pollinators Thematic Network with regional and global pollinator initiatives
8. Maintain the IABIN Pollinators Thematic Network.

**5. General Activities**

The following general activities will be produced or carried out under this consultancy by the selected firm or consortium:

| Activity  | Year 1 | Year 2 | Year 3 |
|---|--------|--------|--------|
| 1. Evaluate the information needs of decision makers and set priorities for the development of the IABIN PTN.   |        |        |        |
| 2. Determine current pollinator conservation and protection initiatives to establish partnerships and avoid duplication to help maximize effectiveness of these and to leverage existing resources.   |        |        |        |
| 3. Analyze the published literature, determine the current state of knowledge on pollinator status, identify knowledge gaps, and establish priorities for addressing these gaps. This activity should be carried out with the participation of all network members and other interested parties |        |        |        |



|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| 4. Coordinate with local, national, and international conservation and protection projects in the areas of pollinator research, education and awareness, conservation and restoration policies and practices, and special partnership initiatives to establish contact, collaboration, and leverage of resources   |  |  |  |  |  |  |
| 5. Assemble a Technical Committee of Experts to evaluate and adapt architecture, standards and protocols required for searching and accessing pollinator databases available in the region. This activity should be in coordination with the Species Thematic Network and allow cross-referencing with other TNs of existing data at different scales allowing queries and searches. |  |  |  |  |  |  |
| 6. Meetings of Technical Committee of Experts  |  |  |  |  |  |  |
| 7. Develop an interoperable online Pollinator Catalog  |  |  |  |  |  |  |
| 8. Install catalog of pollinators experts  |  |  |  |  |  |  |
| 9. Install a website allowing searches and access to the Pollinator Catalog and experts catalog  |  |  |  |  |  |  |
| 10. Design and implement tools in order to integrate the Pollinator Catalog with the specimen, species, ecosystem, and protected areas networks.   |  |  |  |  |  |  |
| 11. Maintain the IABIN Pollinators Thematic Network  |  |  |  |  |  |  |
| 12. Develop multi-lingual data entry tools   |  |  |  |  |  |  |
| 13. Develop multi-lingual training materials   |  |  |  |  |  |  |

These activities will be organized by the Coordinating Institution and the Technical Committee of Experts with the collaboration and facilitation of the Secretariat. In general, these activities should be carried out with the participation of all network members (Focal Points and partner and co-financing organizations) and other interested parties.

## **6. Products**

The following products are identified as deliverables by the firm or consortium to be selected to carry out the development of the IABIN PTN:

- Annual Work Plan
- An interoperable online Pollinator Catalog, including a list of pollinators such as bees, butterflies, beetles, flies, wasps, ants, birds, bats, and others.
- Network infrastructure and services
- A Pollinator Information System linking the Pollinator Catalog to the Specimen, Species Ecosystem, and Protected Areas Thematic Networks, thus providing users a valuable tool that will address pollinator issues such as habitat loss, threats, ecosystem functions, natural history, etc.
- Development of a Pollinators Experts database and online directory
- Multi-lingual data entry tools
- Multi-lingual training materials (such as identification guides, a bibliographic collection, database list, and an image gallery)
- An IABIN Pollinators Thematic Network webpage

- IABIN PTN indicators matrix and a mechanism to monitor and evaluate them using as a guidelines those that appear in Annex 1 Section on Key Performance Indicators in the PIP.

## **6.1. CI Roles and Associates Tasks**

Overall, the CI for the IABIN PTN has a special role in the coordination and promotion of key technical aspects of IABIN such as the development of functioning networks, metadata schema, and development of thematic information resources.

Operational/leadership functions under Interoperability and Access to Data:

- Supervise the operation of the basic network infrastructure: Thematic Networks
- Develop the basic infrastructure necessary to operate the TNs
- Operate and maintain the TNs
- Seek agreements on the use of standards and protocols to ensure compatibility of diverse data sources within the region
- Develop and adapt tools for data content creation
- Development of training packages for the data content creation tools

Operational/leadership functions under Data Content Creation:

- Quality control and validation of information
- Carry out or coordinate training
- Digitization of biodiversity data
- Determine data content creation priorities
- Data Hosting

## **6.2. Network Infrastructure Development and Associated Tasks**

**6.2.1. Data Management.** It is envisioned that the IABIN webpage/portal managed at the IABIN Secretariat in Panama will have some databases, such as content related to the IABIN network. Over time, based on agreements with the Coordinating Institutions (CI's) of the Thematic Networks, some content served from the CI's may be highlighted or potentially even "co-hosted" by the Secretariat. However, the IABIN website will be the "uniform locator" to all IABIN content, information, and data regardless of where it is held. This may be accomplished by just linking and/or hosting some unique or summary information related to the Thematic Network. The Secretariat has the responsibility to develop an "integrated, user cohesive" site for IABIN. While the Coordinating Institution of the Thematic Network has the task of developing specific content and specific technologies; the IABIN Secretariat is responsible for developing the standards (both technical and policy-related) that IABIN requires to function as a "network of networks."

### **The following issues should be addressed:**

Infrastructure Requirements – Hosting, Security, Archival, and Help Desk Support required from the CI for Thematic Network. These infrastructure requirements will help ensure that IABIN data and information are available to all appropriate consumers, are properly maintained, and can be accessed in an instantaneous manner.

- *IABIN Thematic Network Data Structure Standard:* It is the responsibility of the CI, in coordination with the Thematic Working Group, to establish, adopt and

promote a unique IABIN Data Structure Standard for the TN for information exchange in accordance with the IABIN basic standards and protocols.

- *IABIN Thematic Network Hosting:* It is expected that the CI for the Thematic Network has the technical capabilities (e.g., database and interface development, server infrastructure, connectivity, help desk assistance, and system administration and update, among others) to develop and maintain a Website (interface) for the TN, which should be capable of integrating data providers' databases and be compatible with the IABIN Gateway and other Thematic Networks Websites using IABIN basic standards and protocols.
- *IABIN Partner Data Hosting:* CI for the Thematic Network must have the ability to host data and information for IABIN partners who currently do not have that capability. To insure that all IABIN partners' data and information is available through the IABIN network, the IABIN CI for the Thematic Network may also have to host various IABIN country data holdings on an interim basis and provide the tools and procedures to maintain and digitalize this data.
- *Security Processes and Procedures:* Due to the importance of IABIN data and information, the high vulnerability of information on the Internet, and IABIN's goal of providing access to data and information 24x7, proper security policies, practices, and tools need to be implemented within the IABIN network and, specifically by the CI for the Thematic Network in coordination with the Secretariat and other Thematic Networks. These requirements ensure that the proper use, availability, and protection of IABIN information exist into the foreseeable future.
- *Archiving and Mirroring of Data:* As the IABIN network evolves over the next several years, archiving of IABIN metadata, any hosted information, and other IABIN documents will be a requirement of the IABIN CI for the Thematic Network. The IABIN CI for the Thematic Network is also to mirror selected IABIN partner data holdings to improve connectivity and access to information.
- *High-Speed Network Access and Bandwidth:* The CI of the IABIN Thematic Network is required to provide at a minimum T1 to T3 connectivity to its servers. This is important due to the requirement that as users access IABIN information throughout the distributed network, bottlenecks and slow response times do not occur at the central IABIN gateway or at the Thematic Network website level.
- *Help Desk and User Support:* The ability to provide technical help desk support when upgrades and/or downtime are needed is a requirement of the IABIN CI of the Thematic Network.
- *Ensuring Thematic Network long-term sustainability:* The CI should develop a structured Thematic Network sustainability plan (that later will be coordinated with the Secretariat) in order to ensure human, technical and financial resources for the long-term sustainability of the initiative. This plan should also include provisions by which at the end (or during the execution) of the official transfer agreement phase, if the CI can no longer ensure the continued hosting and

maintenance of the Website and data, that the data will be transferred in their entirety to the Secretariat (or other designee), and at no cost to IABIN.

## **7. Proposal Design**

The proposal should include background information that discusses current knowledge on pollination conservation, threats, uses and environmental services provided by pollinators and current initiatives to link this wealth of information to bioinformatics efforts, particularly those geared toward decision makers and environmental education.

A clearly developed methodology that discusses technical aspects required to comply with tasks and to achieve deliverables for the development of the IABIN PTN must be included within the proposal. The proposal should also establish a specific approach to guarantee broad participation of Focal Points, national and co-financing organizations and other interested parties within the planning and development stages of the IABIN PTN.

Proposals to take on the role of the CI will require co-financing, and should specify mechanisms for the long-term maintenance of the TN (see below).

A Thematic Network Coordinator of the IABIN Secretariat will oversee the implementation of the Thematic Networks (described in Sections 3.1.2 through 3.1.7 in the PIP that may be found on <http://www.iabin.net>).

## **8. Monitoring and Reporting Arrangements Requirements**

Overall monitoring and evaluation of the project will be the responsibility of the GS/OAS acting as Executing Agency, with the assistance of the IABIN Secretariat, the Coordinating Institution, the World Bank, and other participants as appropriate. Relative to monitoring of co-financing, the Executing Agency (in conjunction with the Secretariat) will produce a yearly statement of changes in the fund balance of the project, certified by the Treasurer of the executing agency and attesting to the accuracy and completeness of contributions by the Bank and disbursements by the executing agency, and further certification that the in-kind contribution amounts are consistent with the methodology agreed upon between the Bank and the executing agency. These yearly statements will be based in part on information, co financing data, and performance indicators supplied by the Coordinating Institution.

**The Coordinating Institution (CI)** will furnish to the OAS and the IABIN Secretariat not later than 20 days after the end of the first calendar semester after the Coordinating Institution Transfer Agreement start date, and after each subsequent calendar semester, a semi-annual progress (semester) report in Spanish and English that integrates the results of the monitoring and evaluation of the Coordinating Institution Transfer Agreement activities performed, the progress achieved, and sets out the measures recommended to ensure the efficient carrying out of the Coordinating Institution Transfer Agreement and the achievement of the objectives therein during the following six-month period. These semi-annual progress (semester) reports in Spanish and English will also document the project's progress to the IABIN Council and IABINfriends. All key IABIN documents and all semester reports will be posted on <http://www.iabin.net> and distributed to the IABIN Council.

In summary the required reports from the Coordinating Institutions will include:

#### Quarterly Technical Report (component-specific)

- Documents the completion of planned activities and the progress made toward the achievement of desired results, as set out in the Annual Operating Plan of the Coordinating Institution for the specific thematic network.
- Reviews any problems or decisions with an impact on performance.
- Assesses the interest generated by program activities and opportunities for enhancing the impact of the project.
- Provides data for semiannual progress reports and for public information purposes.
- Reviews Annex 1 Section on Key Performance Indicators in the PIP and reports on progress specific to the Thematic Network.
- Provides technical and M & E data for incorporation into semi-annual progress reports.
- Provides background and technical information for dissemination to participating institutions and countries.
- May serve as background materials for specific IABIN training programs and public information and awareness activities.

#### Semiannual Progress (Semester) Reports

- Provides summary of CI activities, highlighting significant results and overall progress toward achievement of objective-level results.
- Serves as a general source of information specific to the Coordinating Institution on IABIN progress for possible distribution to other agencies and interested parties.
- Provides summaries of FMRs (Financial Monitoring Reports).
- Reviews Annex 1 of the PIP Section on Key Performance Indicators and reports on progress.

#### Annual Operating Plan (AOP)

- The AOP should be produced not later than November 30 of each year of Coordinating Institution Transfer Agreement and submitted to GS/OAS who will submit it to the Bank for No Objection. The AOP shall contain the Project activities to be carried out during the calendar year following the date of presentation of said plan to the Bank, and a timetable for the completion of said Project activities during the year in question.
- Highlights which indicators are coming due as stated in Annex 1 Section on Key Performance Indicators in the PIP.

#### Quarterly Financial Monitoring Reports

- Provides an overview of project finances and Coordinating Institution counterpart funds to-date including disbursements and expenditures (See Annex 1 of this TOR).

#### Financial Audits

- Coordinating Institutions will permit, if requested by the GS/OAS or the IABIN Secretariat, Audit of contract and counterpart finances as indicated in the Coordinating Institution Transfer Agreement. Annex 1 of this TOR demonstrates sheets that must be filled out and submitted to track counterpart financing.

## Final Report

- Evaluates the implementation effectiveness of the Coordinating Institutions progress and each project component and the ultimate success of the Coordinating Institutions and its partners in meeting its stated objectives.
- Tracks performance as stated in Annex 1 Section on Key Performance Indicators in the PIP.
- Provides data and information for the Bank's Implementation Completion Report/Final Report.

## **9. Required Co financing**

Institutions wishing to be considered for the Pollinators Thematic Network Coordinating Institution (PTN CI) should review the Project Implementation Plan (PIP) found on <http://www.iabin.net> to familiarize themselves with IABIN's institutional arrangements, co-financing requirements, and reporting.

Proposed CIs must bring significant co-financing resources to implement the TN. These technical and financial resources should be presented with each proposal, which will also be evaluated on methodology, quality of key staff proposed, and relevant experience for the assignment. The CI would awarded the Coordinating Institution Transfer Agreement agrees to provide detailed quarterly co-financing information according to cost guidelines established by the Secretariat. (Annex 1 of this TOR).

The co-financing information should be documented and should be open to potential audits. **Minimum co-financing for a CI must be at least 2:1, for each quarter, thus double the amount of the IABIN contribution. Proposals should include a detailed activities and financing plan for both the IABIN contribution and CI contribution. Activities may be further enhanced by the Matching Grant arm of IABIN. (See PIP and Annex 1 of this TOR.)**

## **Annex 1 - TRACKING OF COUNTERPART FUNDING**

Proposed Coordinating Institutions must bring significant co financing resources to implement the TN. These technical and financial resources will be presented with each proposal that will also be evaluated on methodology, quality of key staff proposed, and relevant experience for the assignment. The CI would agree to provide detailed quarterly co-financing information according to cost guidelines established by the Secretariat. The co-financing information should be documented and should be open to potential audits. Minimum co-financing for a CI must be at least 2:1, thus double the amount of the IABIN contribution. Proposals should include a detailed activities and financing plan for both the IABIN contribution and CI contribution. Activities may be further enhanced by the Matching Grant arm of IABIN.

The following methodology has been designed to facilitate tracking co-financing.

### **A) Questionnaire posted in the Project's Website**

Coordinating Institutions will have access to an Internet based questionnaire that will be posted in the Project's website, with simple questions that will walk the user through all the possible co financing categories for each project component. Coordinating Institutions will also be required to track counterpart financing of their institution and other partner organizations and institutions that benefit from capacity building.

Most answers will be available as a drop-down list that can be selected with a click of the mouse, and others will be blank spaces to be filled with information. Users will submit the form via the Internet directly to OAS and/or IABIN Secretariat (answers will arrive in a simple format via e-mail), where a person will review and input into an Access Database designed specifically to track co-financing for the Project.

Below is a basic design of the questions and the screens that would appear as the user provides the relevant information. Drop-down list of answers will correspond to fields in the access database, which also follows the GS/OAS chart of accounts. Reports will answer queries about co-financing by component, country, institution, and category.

### **PAPER DESIGN OF VIRTUAL QUESTIONNAIRE**

Lines indicate a new screen.

#### **Initial Screen:**

- Statement thanking user for the information that he/she is about to provide
- Statement with instructions: (example: please provide information about the activities and expenses that your institution has funded as part of your co-financing commitment to the network. (exclude all funds provided by the project)

**Country** (drop-down list of 34 countries)

**Institution** (drop down list of 75 institutions)

Please select name of your institution – if not included select 'other' and add name in blank text box.

**Component** (select one of the four project components) (Note: at the end user will be able to return to this screen to provide information for additional components or to end session)

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Example: User selects component 1 – Interoperability and Access to Data.

**Type of Co-financing** (drop-down list)

Personnel Costs (drop-down list for each one; see chart of accounts)

Travel

Documents

Equipment & Supplies

Building & Maintenance

External Service Contracts

Other Costs

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D) Design of Access Database

Database will consist of the following four tables with relationships among all, so that it will be possible to generate reports in response to queries by country, component, institution or expenditure category.

Table 1 – Project Components

|               |                                     |
|---------------|-------------------------------------|
| Cost Center 1 | Interoperability and Access to Data |
| Cost Center 2 | Data Content Creation               |
| Cost Center 3 | Tools for D-Making                  |
| Cost Center 4 | Sustainability of IABIN             |
| Cost Center 5 | Project Administration              |

Table 2 – Expenditure Categories

|       |                            |
|-------|----------------------------|
| 50100 | PERSONNEL COSTS            |
| 50400 | TRAVEL                     |
| 50500 | DOCUMENTS                  |
| 50600 | EQUIPMENT & SUPPLIES       |
| 50700 | BUILDING & MAINTENANCE     |
| 50800 | EXTERNAL SERVICE CONTRACTS |
| 50900 | OTHER COSTS                |

Table 3 – Countries

|    |                     |
|----|---------------------|
| 01 | Antigua and Barbuda |
| 02 | Argentina           |
| 03 | Bahamas             |
| 04 | Barbados            |
| 05 | Belize              |
| 06 | Bolivia             |
| 07 | Brazil              |
| 08 | Canada              |
| 09 | Chile               |
| 10 | Colombia            |
| 11 | Costa Rica          |
| 12 | Dominica            |
| 13 | Dominican Republic  |
| 14 | Ecuador             |
| 15 | El Salvador         |
| 16 | Grenada             |
| 17 | Guatemala           |
| 18 | Guyana              |
| 19 | Haiti               |
| 20 | Honduras            |
| 21 | Jamaica             |
| 22 | Mexico              |
| 23 | Nicaragua           |



- 24 Panama
- 25 Paraguay
- 26 Peru
- 27 St. Kitts and Nevis
- 28 Saint Lucia
- 29 St. Vincent and Grenadines
- 30 Suriname
- 31 Trinidad and Tobago
- 32 United States
- 33 Uruguay
- 34 Venezuela

Table 4 – Participating Institutions (will increase as necessary)

- 01 Asociación Boliviana para la Conservación – TROPICO (Bolivia)
- 02 Autoridad Nacional de Ambiente Panamá
- 03 BioNET International
- 04 Bird Life International
- 05 CaribHerp – Pennstate University (US-Caribbean)
- 06 CCAD
- 07 Centro de Estudios Conservacionistas (CECON), Universidad de San Carlos (Guatemala)
- 08 Centro de Malacología, Universidad Centroamericana de Managua (Nicaragua)
- 09 CIAT (Colombia)
- 10 Ciudad del Saber - Fundación (Panama)
- 11 Colección Boliviana de Fauna (Bolivia)
- 12 Commission For Environmental Cooperation
- 13 Comité Nacional Pro Defensa de la Flora y Fauna - Amigos de la Tierra (CODEFF) (Chile)
- 14 Conabio (Mexico)
- 15 Consortium for Caribbean (MCZ Harvard University) (US-Caribbean)
- 16 Convenio Andres Bello (CAB)
- 17 Corporación Nacional Forestal (CONAF) (Chile)
- 18 CRIA (Brazil)
- 19 Fundación La Salle de Ciencias Naturales (FLASA) (Venezuela)
- 20 Fundación de Historia Natural Félix de Azara (Argentina)
- 21 Grupo de Conservación de Germoplasma ex situ de Raíces y Tuberosas Andinas (RTA's) Univ Ricardo Palma
- 22 Escuela Politécnica Nacional del Ecuador
- 23 Fundacion Habitat
- 24 Guyra Paraguay
- 25 Herbario Nacional de Bolivia
- 26 Herbario Nacional de Ecuador
- 27 I3N (NBII) (USGS)
- 28 IABIN Focal Points of participating countries
- 29 IADIZA-CRICYT
- 30 INBio (Costa Rica)
- 31 Instituto Alexander von Humboldt (Colombia)
- 32 Instituto de Botánica Darwinion (Argentina)
- 33 Instituto Geográfico de Venezuela
- 34 MINAE Costa Rica
- 35 Ministerio de Ciencia y Tecnología de Venezuela
- 36 Ministerio del Ambiente y Recursos Naturales (MARENA) (Nicaragua)
- 37 Ministry of Environment Haiti
- 38 MIZA (Venezuela)
- 39 Museo Argentino de Ciencias Naturales (MACN) (Argentina)
- 40 Museo de la Plata -- Argentina

- 41 Museo de Zoología, Universidad de Costa Rica
- 42 Museo Entomológico de León (Nicaragua)
- 43 Museo Nacional de Costa Rica
- 44 Museo Nacional de Historia Natural (Chile)
- 45 National Biodiversity Network
- 46 NatureServe (Infonatura) (US)
- 47 NORAD
- 48 Organization of American States (OAS)
- 49 Secretariat Host
- 50 SERNA (Honduras)
- 51 Servicio Agrícola y Ganadero (Chile)
- 52 Smithsonian Panamá
- 53 The Bahamas Environment, Science and Technology Commission (Ministry of Health and Env.)
- 54 The Nature Conservancy
- 55 UNEP (GRID)
- 56 UNEP Caribbean CAR RCU
- 57 UNEP Mexico
- 58 Universidad Austral (Chile)
- 59 Universidad de Concepción (Chile)
- 60 Universidad de los Andes (CVULA)
- 61 Universidad de los Andes (ULABG) (Venezuela)
- 62 Universidad de Panamá
- 63 Universidad Nacional de Tucumán (Argentina)
- 64 Universidad Nacional del Nordeste - Fac. Ciencias (UNNE) - Colección Herpetologica Corrientes
- 65 University of California, Davis (Information Center for the Environment)
- 66 University of Suriname
- 67 USGS/EROS Data Center
- 68 USGS/NBII
- 69 West Indian Whistling-Duck
- 70 Development Grant Facility (WB)
- 71 WB Colombia Disaster Management Project (WB)
- 72 WB Development Gateway
- 73 WB Env. SALs (Mexico, Brazil)
- 74 WB Honduras Disaster Vulnerability (support to SINIA)
- 75 WB Second Rural Municipality Project (support to SINIA)
- 76 WB/MBC/Dutch Trust Fund