

ECOCEANOS CORPORATION

TERMS OF REFERENCE

2023 Call for Proposals

Biodiversity Conservation through Community-Based Tourism in Colombia

Grant Award: USD 100,000
One Colombian implementing organization
Project start: 2 September 2023

Issued: 2 January 2023
San José, Costa Rica
www.ecoceano.org

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1. Call Overview and Governing Parameters

ECOCEANOS CORPORATION invites eligible Colombian organizations to submit proposals for the 2023 Call for Proposals: Biodiversity Conservation through Community-Based Tourism in Colombia. Through this competitive process, we will select one organization to design and implement a twelve-month project that uses tourism as a practical economic mechanism for protecting biodiversity. The selected project must operate in a clearly delimited Colombian destination where natural ecosystems and local livelihoods are directly connected. We expect the intervention to demonstrate how visitor activity can finance or reinforce conservation while generating measurable value for the people who live in the territory.

The grant award is USD 100,000. We will execute one funding agreement with the selected organization. The agreement will begin on 2 September 2023 and will end on 1 September 2024, unless a written amendment approved by ECOCEANOS changes the closing date. The full grant will be committed at contract signature and released through four milestone-based payments of USD 25,000. Each subsequent payment will depend on the acceptance of technical evidence and financial documentation corresponding to the previous implementation stage. This arrangement links cash flow to execution quality and protects continuity of the project when agreed outputs are delivered on time.

The call opens on 2 January 2023 and closes on 2 April 2023 at 23:59 Colombia time. ECOCEANOS will complete the technical and institutional evaluation during April. We will announce the winning organization on 2 May 2023. The period from 3 May to 31 August is reserved for due diligence, refinement of the results framework, verification of banking and legal documents, and signature of the funding agreement. This period also allows the selected organization to obtain local authorizations before field implementation begins. Activities charged to the grant may not start before 2 September 2023 unless ECOCEANOS provides written authorization.

Purpose of this call

We seek one implementer capable of converting a biodiversity-rich destination into a better-managed tourism system in which local people obtain income from conservation-compatible services and the project can demonstrate measurable ecological stewardship during the grant period.

Parameter	Requirement
Call reference	ECO-TOURBIO-2023-01
Funding organization	ECOCEANOS CORPORATION, San José, Costa Rica
Eligible country of implementation	Colombia
Number of awards	One
Grant amount	USD 100,000
Application period	2 January - 2 April 2023
Winner announcement	2 May 2023
Implementation period	2 September 2023 - 1 September 2024
Official contact	Juan Diego Correa Hernandez - manager@ecoceano.org

These Terms of Reference govern the competitive process. Applicants are responsible for reading the full document before submitting. A proposal may be technically strong and still be declared ineligible if the applicant does not meet the organizational requirements, misses the deadline, requests a different amount, or presents a project that does not link tourism promotion to biodiversity conservation. We will evaluate the complete package rather than isolated activities. The selected project must show a credible sequence from baseline evidence to implementation, from implementation to measurable change, and from measurable change to a model that local actors can maintain after the grant ends.

2. Rationale, Problem Definition and Program Logic

Tourism can generate income in biodiversity-rich territories, yet unmanaged visitation can also intensify habitat disturbance, waste generation, extraction pressure and conflict over natural assets. The central problem addressed by this call is the weak connection between tourism income and the ecological systems that make a destination attractive. When local tourism grows without visitor rules, conservation financing or community stewardship, the destination can lose the environmental quality on which future demand depends. We therefore require a project in which the tourism mechanism and the conservation mechanism are designed as one operating system rather than as unrelated workstreams.

ECOCEANOS has worked publicly on coastal ecosystem conservation and on the environmental pressures associated with tourism. Our institutional experience includes community work related to marine and coastal ecosystems, microplastic pollution and the promotion of sustainable tourism. This call extends that logic to a competitive national process. We are interested in proposals that can apply the same discipline to any Colombian destination where biodiversity has clear ecological value and where communities can participate in tourism-compatible conservation. The destination may be coastal, insular, riverine, wetland, forest or mountain. What matters is that the ecological unit and the tourism economy can be measured within a defined geography.

The program logic is causal. First, the implementing organization will establish a baseline that identifies biodiversity values, visitor pressure, tourism actors and household participation in the local tourism economy. Second, the organization will translate that baseline into a visitor-management and conservation plan with spatial priorities. Third, the project will improve community tourism products and train local operators so that income depends on compliant environmental practices. Fourth, the project will establish community monitoring that tracks both tourism performance and ecological pressure. The final stage will compare endline results against the baseline and document which mechanisms should remain in operation after grant closure.

2.1 Theory of change

If local tourism businesses, guides and community organizations obtain practical tools to offer biodiversity-based experiences, and if visitor flows are managed through rules derived from ecological evidence, then tourism can create a financial incentive to protect habitat rather than consume it. This effect becomes more credible when community monitors can detect changes in environmental pressure and when the destination has a simple mechanism for reinvesting part of tourism value in conservation. The project must therefore connect economic participation, visitor management and biodiversity monitoring through shared indicators.

2.2 Minimum problem statement required from applicants

Each proposal must identify one concrete territorial problem. The applicant must quantify the tourism pressure or tourism opportunity and identify the biodiversity feature at risk or under-managed. The analysis must use recent evidence whenever available. At minimum, the proposal shall define the number of communities or settlements involved, the estimated number of local tourism actors, the relevant ecosystem area or linear feature, the principal pressure created by current tourism, and the biodiversity outcome that can reasonably change within twelve months. Statements such as 'promote ecotourism' or 'raise awareness' are insufficient unless they are linked to a measurable problem and an implementable mechanism.

Program logic stage	Required evidence
Baseline	Mapped territory, biodiversity values, tourism flow and stakeholder baseline
Design	Visitor-management protocol and conservation action plan
Implementation	Community tourism products operating under environmental standards
Monitoring	Tourism and biodiversity indicators tracked at agreed intervals
Sustainability	Local governance and financing mechanism maintained beyond grant closure

3. Geographic Scope, Target Population and Eligible Intervention Model

The project must be implemented in Colombia within one geographically coherent tourism destination or ecological corridor. We define a coherent destination as an area where visitor movement, community livelihoods and the focal ecosystem can be managed through a single results framework. An applicant may work across more than one municipality when the ecological unit requires it, but the proposal must explain why the municipalities function as one destination. National campaigns without a field territory are not eligible. Projects that distribute activities across unrelated regions are also ineligible because they prevent credible measurement of ecological and tourism outcomes within the twelve-month period.

The target population is the local population whose income, cultural practices or territorial management are connected to the proposed destination. The selected project must directly engage at least 250 people. Direct engagement means that a person receives a defined service, participates in a formal conservation or tourism function, or is part of a local enterprise supported by the project. The project should reach at least 1,000 additional residents or visitors through interpretation, destination communication or community outreach. Applicants may exceed these figures, but higher numbers will not receive additional credit unless the implementation model and budget show that quality can be maintained.

At least 60 local participants must complete structured training linked to an operational role. Training should prepare guides, hosts, community monitors or small tourism operators to apply the project's standards. At least 50 percent of these training places should be assigned to women and people aged 18 to 30 combined, unless the applicant provides a territorial justification for a different composition. Where Indigenous, Afro-descendant or other ethnic communities hold collective rights in the intervention area, their governance authorities must be involved before implementation. The proposal must describe how consent, local decision-making and benefit distribution will be managed.

3.1 Eligible tourism mechanism

The project must develop or strengthen at least four market-ready tourism experiences, services or routes that depend on biodiversity conservation. Each experience must have a defined operator, price structure, carrying or visitation rule, environmental interpretation content and a method for recording use. Examples may include guided wildlife observation, community-led mangrove routes, forest interpretation, low-impact river experiences or locally operated biodiversity trails. The applicant may propose a different format when it fits the territory. Infrastructure may support the experience, but the project cannot be designed primarily as a construction project.

3.2 Eligible conservation mechanism

The conservation mechanism must address a pressure associated with the destination. The project must place at least 2,500 hectares under improved visitor or community conservation management, or demonstrate an equivalent ecological unit when hectares are not meaningful. For river, reef or coastline interventions, the applicant may use kilometers, sites or monitoring stations instead. At least 25 community monitoring points or equivalent observation units must be established. The proposal must also define one direct conservation action, such as habitat restoration, visitor zoning, waste-pressure reduction, species monitoring or protection of sensitive breeding areas. The action must be measurable at baseline and at project end.

Minimum operating standard	Threshold
Direct local participants	At least 250 people
Broader outreach	At least 1,000 residents or visitors
Structured local training	At least 60 people
Tourism products or routes	At least 4 operational experiences
Community monitoring points	At least 25 points or equivalent units

Minimum operating standard	Threshold
Conservation management area	At least 2,500 ha or justified ecological equivalent

4. Objectives, Results and Minimum Performance Standards

The overall objective of the funded project is to increase the economic value of conservation-compatible tourism in one Colombian biodiversity destination while reducing measurable pressure on the ecosystem that sustains that tourism. The selected organization will translate this objective into a site-specific results framework during inception. ECOCEANOS will approve the final baseline values before the second disbursement. Applicants may propose more ambitious targets, but the minimum standards in these Terms of Reference will remain contractual unless a target becomes technically impossible for reasons documented and accepted in writing.

4.1 Result 1 - Destination baseline and management rules

By the end of Month 2, the project must deliver a georeferenced baseline that defines the intervention boundary, focal biodiversity values, tourism pressure points and local tourism actors. The baseline must establish at least five indicators that can be measured again at endline. It must also identify sensitive areas where visitation requires limits or specific behavior. Based on this evidence, the implementing organization will prepare a visitor-management protocol. The protocol shall specify acceptable uses, monitoring responsibilities and a practical response when a threshold is exceeded. ECOCEANOS will use this package as the technical basis for accepting Milestone 2.

4.2 Result 2 - Community tourism products operating under conservation standards

By Month 6, at least four tourism experiences must be operational or demonstrably market-ready. Each experience must have a local operator and a documented conservation rule. The selected organization must test the visitor journey, price the service and record at least one pilot transaction or simulated service under field conditions. By the final quarter, participating operators should demonstrate a minimum 15 percent increase in recorded paid tourism transactions or tourism-derived revenue compared with the baseline period, where a comparable baseline exists. When seasonality prevents a direct comparison, the organization must use an alternative indicator approved during inception.

4.3 Result 3 - Community stewardship and measurable ecological response

The project must establish a community monitoring system that functions throughout implementation. At least 60 trained participants must understand the field protocol, and at least 25 monitoring points or equivalent observation units must report data. The conservation target will depend on the focal pressure. For example, a waste-intensive destination may commit to a 30 percent reduction in observed tourism-related waste at monitored points. A wildlife destination may commit to full compliance with minimum approach distances and a decline in disturbance events. A trail system may commit to a 20 percent reduction in unauthorized access to sensitive zones. The applicant must select indicators that can be verified without expensive research equipment.

4.4 Result 4 - Local governance and sustainability

By project closure, the destination must have a local mechanism that can continue the tourism-conservation relationship. This may be a destination committee, community tourism association, conservation fee arrangement, operator code or another locally legitimate structure. The mechanism must have named responsibilities and a simple financial or operational rule. At least two local institutions or organized community bodies must formally endorse its continuation. The final report must explain which project functions will continue, who will finance them, which indicators will still be collected, and what level of annual operating cost is required.

Result	Contractual minimum by project end
R1. Evidence-based destination management	Baseline, mapped pressure points and approved visitor-management protocol
R2. Conservation-compatible tourism offer	4 operational products or routes; local operators recording use and revenue
R3. Community stewardship	60 trained participants; 25 monitoring points; site-specific ecological pressure target
R4. Sustainability	Local governance mechanism with at least 2 institutional or community endorsements

5. Eligible Applicants, Partnerships and Institutional Capacity

The applicant must be a legally constituted Colombian organization with authority to receive and administer international grant funds. Eligible applicants may include non-profit organizations, foundations, associations, community-based organizations with legal personality, universities or other non-commercial entities that can sign a grant agreement. The applicant must have been legally established for at least two years by the closing date. It must demonstrate an active governing structure and a bank account held in the organization's legal name. Fiscal sponsorship by an unrelated third party is not accepted for this call because ECOCEANOS will contract directly with the selected implementer.

The applicant must demonstrate experience that is relevant to the proposed mechanism. We expect evidence from at least two completed or substantially implemented projects in community development, conservation, tourism or territorial management. At least one reference project should show work with local communities in field conditions. The combined value of the two references should demonstrate that the applicant has managed resources at a scale compatible with a USD 100,000 award. We will assess management systems rather than institutional size. A smaller organization can be competitive when it has reliable controls, clear field presence and realistic staffing.

Partnerships are permitted and may strengthen a proposal when they fill a defined implementation gap. A local tourism association may manage product development. A university may support biodiversity monitoring. A public authority may provide access, permits or visitor data. Every partner named as essential to delivery must provide a letter confirming its role before contract signature. The applicant remains fully responsible for grant performance and financial reporting. ECOCEANOS will not divide the award among multiple co-grantees, and consortium arrangements that obscure accountability will be scored lower under management capacity.

5.1 Mandatory organizational documents

- Certificate or equivalent document showing current legal existence and representation, issued within the previous 90 days where applicable.
- Governing statutes or bylaws and tax identification documentation.
- Most recent annual narrative report and the two most recent annual financial statements available at the time of application.
- Organizational chart identifying decision authority for the proposed project.
- Two independent institutional or donor references with contact information.

The selected organization will undergo due diligence between May and August 2023. ECOCEANOS may request bank certification, anti-fraud declarations, safeguarding policies, procurement procedures, proof of insurance or clarification of financial statements. A successful technical score does not create a right to funding until due diligence is completed and the agreement is signed. If the highest-ranked applicant cannot satisfy a material due-diligence requirement within the contracting period, ECOCEANOS may negotiate with the next-ranked applicant.

5.2 Ineligible applicants and arrangements

For-profit companies may participate as service providers or local tourism partners, but they may not be the primary applicant. Government entities may support implementation but may not receive the grant as the implementing organization. Political parties, individual applicants and informal groups without legal capacity are ineligible. Applications are also ineligible when a related party would receive an excessive share of the award without competitive procurement. ECOCEANOS may reject an application when the proposed structure creates an unmanaged conflict of interest or when the organization cannot separate project expenditure from unrelated institutional expenditure.

6. Required Technical Approach and Work Packages

Applicants must organize implementation around six work packages. The work packages define the minimum architecture of the funded project while allowing each organization to adapt methods to its territory. The proposal should explain the sequence between packages rather than present a catalogue of activities. ECOCEANOS will evaluate whether each activity produces a usable decision, an operating tourism function or a measurable conservation result. Workshops without an operational purpose, promotional campaigns without a destination product, and monitoring that is disconnected from management decisions will receive low technical scores.

6.1 Work Package 1 - Inception and territorial baseline

The organization will confirm the project boundary, stakeholder map and baseline methodology during the first thirty days. Field data collection must then establish the initial condition of focal biodiversity indicators and tourism pressure. The baseline will include visitor flow or tourism transaction information that can be compared at endline. The organization must also document current local roles in tourism and conservation. Where primary data collection is necessary, methods should be simple enough for community monitors to repeat. The inception report will convert the proposal into a final operational plan with named responsibilities and a dated procurement schedule.

6.2 Work Package 2 - Visitor management and conservation planning

Using baseline evidence, the organization will identify where tourism creates pressure and where tourism can create a conservation incentive. The project will establish rules for access, group size, visitor behavior or seasonality when needed. It will define the conservation action connected to the tourism mechanism. The organization must identify which local actor has authority to apply each rule. Where the territory overlaps a protected area or collective territory, the plan must align with existing authority. This work package must produce a concise visitor-management protocol that local operators can actually use in daily decisions.

6.3 Work Package 3 - Product development and market activation

The project will develop or strengthen at least four tourism experiences. Each one must translate biodiversity value into a concrete visitor proposition without encouraging damaging use. The implementing organization will define service standards, environmental interpretation and a transparent price. At least one market test will be completed for each experience. Promotion may include digital communication, alliances with travel intermediaries or destination media. Promotional expenditure must remain proportionate to field implementation. The project will not fund mass advertising when local operators are not ready to receive visitors under the agreed environmental rules.

6.4 Work Package 4 - Local capacity and enterprise support

At least 60 local participants will complete structured training linked to a real function. The training sequence should include conservation rules and tourism service delivery. Participants who serve as monitors must practice the field protocol. Participants who manage tourism products must understand basic pricing, booking records and visitor feedback. The project should avoid attendance-only training. Completion evidence must show that the participant can perform the assigned task. Where small equipment is required for a local service, the proposal must explain ownership, maintenance and post-project use before purchase.

6.5 Work Packages 5 and 6 - Monitoring, learning and sustainability

Monitoring will run from baseline to closure. The organization will collect indicator data at agreed intervals and review it with local actors at least quarterly. If a tourism activity is increasing pressure, the project must be able to adjust visitor rules. If market uptake is weak, the organization must document corrective action rather than wait until the final report. During the final two months, the organization will formalize the local governance and financing mechanism that will remain after the grant. The closeout package will include endline data, lessons, financial reporting and a twelve-month post-grant continuity plan.

7. Implementation Schedule, Milestones and Deliverables

The funded project will run for twelve months. We expect the selected organization to mobilize immediately on 2 September 2023 because four months are available between award announcement and project start for due diligence and preparation. The schedule below is designed to front-load the baseline and management decisions, move product development into the middle of the grant, and reserve the final quarter for full operation and outcome measurement. Applicants may refine the detailed activity sequence, but the four contractual milestones and the final closing date will remain fixed unless ECOCEANOS approves an amendment.

Period	Core deliverable	Acceptance evidence
2 Sep - 1 Oct 2023	Inception package	Final workplan, procurement plan, stakeholder map, risk register and confirmed field boundary
2 Oct - 1 Dec 2023	Baseline and management design	Georeferenced baseline, indicator definitions, visitor-management protocol and conservation action plan
2 Dec 2023 - 1 Apr 2024	Implementation package	At least 60 trainees progressing; four tourism products designed/tested; monitoring network operating
2 Apr - 1 Jul 2024	Midterm performance milestone	At least 60% of planned outputs completed; tourism products operating; financial utilization reviewed
2 Jul - 1 Sep 2024	Endline and closure	Endline, sustainability mechanism, final technical report, financial report and asset register

The selected organization will submit a short monthly implementation dashboard within ten calendar days after each month ends. The dashboard will report progress against the approved workplan, expenditure against budget, indicator values available that month, procurement status and material risks. The dashboard is a management instrument rather than a narrative report. Its purpose is to detect slippage early. ECOCEANOS may request a corrective action plan when an activity is more than thirty days behind schedule, when a contractual indicator is materially off track, or when a financial variance exceeds 15 percent within a budget category.

7.1 Contractual milestones

Milestone 1 is satisfied when the funding agreement is signed and all conditions precedent are complete. Milestone 2 is satisfied when ECOCEANOS accepts the baseline and visitor-management package. Milestone 3 is satisfied when the midterm review confirms that at least 60 percent of planned outputs are complete and that the tourism-conservation mechanism is operating in the field. Milestone 4 is satisfied when the final technical and financial reports are accepted and all grant-funded assets have been accounted for. Payment timing will follow these acceptance points rather than calendar dates alone.

7.2 Deliverable quality standards

A deliverable will be accepted when it is complete, internally consistent and supported by evidence. A training report must identify participants and demonstrate completion. A tourism product must identify its operator and show a test or actual use. A monitoring result must state the method and observation period. A financial report must reconcile to bank and accounting records. ECOCEANOS may return a deliverable for correction when evidence is incomplete. The organization will normally have ten business days to correct the submission. Revisions do not automatically change the contractual end date.

Field visits may be used to verify milestone completion. ECOCEANOS may conduct the visit directly or engage an independent specialist. The implementing organization must provide reasonable access to project sites, records and participating actors while respecting community protocols and safety restrictions. A field visit is intended to verify the operating system described in the reports. It is not a substitute for the organization's own monitoring responsibility.

8. Grant Budget, Eligible Costs and Disbursement Conditions

The total grant is fixed at USD 100,000. Applicants must submit a budget that uses the full grant and shows the relationship between expenditure and results. The budget should be prepared in United States dollars. Applicants may include a parallel Colombian-peso working budget for management purposes, but the contractual ceiling will remain USD 100,000. The proposed cost structure must be realistic for a twelve-month field project. ECOCEANOS will evaluate unit costs and the proportion of resources that reach the destination. Large administrative allocations or purchases without a clear operating role will reduce the value-for-money score.

8.1 Recommended budget architecture

Budget category	Indicative range	Purpose
Field implementation and conservation	25-35%	Baseline fieldwork, monitoring, conservation action and local implementation
Community tourism development	20-30%	Product design, interpretation, testing and market activation
Local training and participation	10-20%	Structured training, facilitation and community participation costs
Personnel and technical coordination	15-25%	Project management and specialized technical time directly attributable to delivery
Monitoring, evaluation and audit	5-10%	Indicator verification, financial review and endline
Administration	Maximum 10%	Reasonable organizational support directly required to administer the grant

The ranges are guidance rather than rigid quotas, except for the 10 percent administration ceiling. A project may justify a different technical distribution when field conditions require it. Personnel costs must identify the role, level of effort and basis of calculation. Equipment must be necessary for delivery and proportionate to the grant. Equipment purchased with grant funds will remain assigned to the project during implementation and must be listed in the final asset register. International travel is eligible only when it directly supports delivery and cannot be replaced by local expertise. Land purchase, debt repayment and financial investments are ineligible.

8.2 Disbursement schedule

Payment	Amount	Trigger	Expected timing
1	USD 25,000	Funding agreement signed; due diligence complete; bank account verified	At contract signature, before project start

Payment	Amount	Trigger	Expected timing
2	USD 25,000	Milestone 2 accepted: baseline, visitor-management protocol and detailed results framework	Approximately Month 3
3	USD 25,000	Milestone 3 accepted: midterm review confirms at least 60% output progress and satisfactory financial management	Approximately Month 7
4	USD 25,000	Milestone 4 accepted: endline, final technical report, final financial report and asset reconciliation	At project close

The first payment provides working capital. Before requesting the second payment, the organization must report use of the first tranche and submit the required milestone evidence. ECOCEANOS may withhold a subsequent payment when financial records are incomplete, a material safeguard issue remains unresolved, or implementation performance creates a reasonable risk that the project will not achieve its core results. Withholding a payment is a control measure and will be documented in writing. The organization will receive a clear list of corrective actions and a deadline for response.

Budget transfers between approved categories of up to 10 percent of the total grant may be made with written notification when the change does not alter the project objective or reduce a contractual result. Larger reallocations require prior written approval. The organization may not use savings to create unrelated activities. Any unspent balance at project closure must be returned unless ECOCEANOS authorizes its use for an agreed closeout activity before the end date.

9. Monitoring, Evaluation, Learning and Verification

Monitoring must allow ECOCEANOS and the implementing organization to determine whether the project changed both the tourism system and the conservation condition. We therefore require a compact indicator set rather than a long list of activities. The selected organization will finalize indicator definitions during inception. Each indicator must have a baseline, target, frequency, data source and responsible person. Where baseline information is unavailable at application stage, the proposal must explain how it will be collected during the first sixty days and why the indicator is feasible within the grant period.

9.1 Core indicator framework

Indicator	Minimum target	Verification
Direct local participants	250 people	Registration records linked to a defined project service or role
Participants completing role-based training	60 people	Completion assessment and attendance record
Operational tourism experiences	4 products/routes	Operator record, pricing, conservation rule and field test
Community monitoring units	25 points or equivalent	Georeferenced or otherwise uniquely identified monitoring record
Area under improved management	2,500 ha or justified equivalent	Map and management evidence
Tourism performance	15% improvement where comparable baseline exists	Booking, transaction or revenue records
Ecological pressure response	Site-specific measurable target	Baseline/endline field observation using same method
Local sustainability mechanism	1 functioning mechanism	Signed governance or operating record with 2 endorsements

The organization must preserve source records that allow a reviewer to reproduce reported figures. Personal information should be minimized and handled under applicable data-protection rules. Photographs may support evidence but cannot replace structured records when a number is being reported. GPS points, observation sheets, booking logs, receipts or signed community records may be appropriate depending on the indicator. ECOCEANOS may request anonymized underlying data for verification. Sensitive biodiversity coordinates should be restricted when disclosure could increase collection, hunting or disturbance risk.

9.2 Learning and adaptive management

Quarterly review meetings will compare implementation evidence against the approved theory of change. The meeting should answer two operational questions: whether the tourism mechanism is generating use or income, and whether environmental pressure is moving in the intended direction. When one side improves and the other deteriorates, the project must adjust. For example, stronger visitor demand may require smaller groups or additional monitoring. Weak sales may require a change in distribution or product design. The organization will document each major adaptation and the evidence that justified it.

9.3 Independent verification

ECOCEANOS may commission an independent technical or financial review. The review may be desk-based or field-based. The selected organization must cooperate by providing records and reasonable access. Independent verification is particularly likely before the third or fourth disbursement when reported results are central to payment approval. The reviewer may test a sample rather than every transaction or monitoring point. Material discrepancies must be corrected before a milestone is accepted. A discrepancy is material when it changes the conclusion about achievement of a contractual target or the allowability of a significant expenditure.

The final evaluation will compare endline values with the approved baseline and will explain attribution limits. The report must distinguish project outputs from broader changes in the destination. Visitor numbers may change because of seasonality, weather or transport conditions. Biodiversity observations may vary because of detection probability. We expect the implementing organization to discuss these factors explicitly. Credible interpretation will be valued more highly than unsupported claims of impact.

10. Application Package and Submission Instructions

A complete application must allow evaluators to understand the territory, the operating mechanism, the organization responsible for delivery and the budget required to achieve the proposed change. We will not assess a concept note in isolation from institutional capacity. Applicants should submit one consolidated application package in PDF format, with supporting annexes clearly named. The narrative proposal should normally be between 15 and 25 pages excluding annexes. Applications may be submitted in English or Spanish. Financial figures must be stated in USD, and any local-currency estimates should identify the exchange-rate date used for planning.

10.1 Required proposal content

1. Executive summary: project title, territory, focal biodiversity value, tourism problem, proposed mechanism, direct participants and requested amount.
2. Territorial problem analysis: quantitative baseline information available at application stage, principal pressure, stakeholder map and justification for the selected destination.
3. Technical approach: theory of change, six work packages, conservation mechanism and tourism product strategy.
4. Results framework: objectives, outputs, indicators, baseline values where known, targets, data sources and assumptions.
5. Implementation plan: twelve-month schedule, staffing, partner roles and procurement needs.
6. Budget and budget narrative: full USD 100,000 allocation and justification of major unit costs.
7. Risk and safeguards analysis: environmental, social, fiduciary and operational risks with mitigation measures.
8. Sustainability plan: governance, financing and local ownership after September 2024.

The supporting package must include the mandatory organizational documents listed in Section 5. Applicants should also attach letters from partners that are essential to field access or delivery. A letter of support is useful only when it confirms a concrete contribution. Generic endorsements will not strengthen the score. When the intervention affects a collective territory, protected area or other regulated site, the proposal must identify the permission or consultation pathway. Final permits may be completed after selection when timelines require it, but the applicant must show that implementation is legally feasible.

10.2 Submission procedure

Applications must be sent electronically to manager@ecoceano.org no later than 2 April 2023 at 23:59 Colombia time. The subject line should read: 'ECO-TOURBIO-2023-01 - [Applicant Legal Name]'. The main proposal and budget should be attached directly or shared through a stable download link when file size requires it. The applicant is responsible for ensuring that ECOCEANOS can access the files without requesting permissions. A submission is considered received when the electronic message reaches the designated mailbox before the deadline. Late applications will not be evaluated.

10.3 Questions and clarifications

Applicants may send written questions to the same address until 20 March 2023. ECOCEANOS will consolidate material clarifications and may circulate answers to organizations that have expressed interest in the call. Questions received after that date may not receive a response before closing. ECOCEANOS may issue a written amendment if a clarification changes a requirement. Oral statements, informal messages or conversations with staff do not amend these Terms of Reference. Applicants must rely on the written call and any written amendment issued before the deadline.

ECOCEANOS may request clarification after closing when a document is ambiguous or when a minor administrative item is missing. Clarification cannot be used to redesign the project, replace the proposed territory, change the requested amount or introduce a new implementing organization. This rule protects equal treatment. A proposal that is materially incomplete at the deadline may be rejected without technical scoring.

11. Evaluation Process, Scoring and Award Decision

Evaluation will occur in four stages: administrative screening, technical scoring, institutional due diligence and final award approval. Administrative screening verifies that the applicant and submission meet mandatory requirements. Proposals that pass screening will be scored by evaluators using the matrix below. ECOCEANOS may invite the highest-ranked applicants to a clarification interview before completing the ranking. The interview does not replace the written application. Its purpose is to test management understanding, confirm assumptions and assess whether the proposed team can explain how the tourism and conservation mechanisms interact.

Criterion	Weight	What we will assess
Problem definition and territorial evidence	15	Clarity of the biodiversity-tourism problem; quality of baseline evidence; coherent geographic scope
Technical design and causal logic	25	Feasibility of the six work packages; link between tourism value and conservation action; appropriateness of methods
Expected results and measurement	15	Quality of indicators, targets, verification methods and baseline/endline design
Community participation and local governance	15	Meaningful local roles, benefit distribution, authority relationships and sustainability mechanism
Organizational and team capacity	10	Relevant delivery record, field presence, project management and financial controls
Budget and value for money	10	Reasonable unit costs, proportion reaching implementation and relationship between cost and results
Risk, safeguards and feasibility	10	Ability to identify and manage environmental, social, operational and fiduciary risks

Criterion	Weight	What we will assess
TOTAL	100	Minimum competitive technical score: 70 points

A proposal must score at least 70 points to remain eligible for award. Reaching 70 points does not guarantee funding because only one grant is available. ECOCEANOS will rank proposals by total score and may consider material due-diligence findings before final approval. If two proposals receive the same total score, the proposal with the higher combined score for technical design and expected results will rank first. If the tie remains, the higher community participation score will determine the ranking. ECOCEANOS may decide not to make an award if no proposal is sufficiently feasible or if due diligence identifies unacceptable risk.

11.1 Evaluation principles

Evaluators will score what is evidenced in the application. Familiarity with an organization will not replace documentation. Ambition will be considered together with feasibility. A proposal that promises very large beneficiary numbers without a delivery mechanism will not receive a stronger score than a smaller, measurable intervention. Similarly, a sophisticated biodiversity methodology will not compensate for a weak tourism mechanism when the call objective requires both. The highest-scoring proposal should show that the same field system can create visitor value, improve local participation and reduce a defined ecological pressure.

11.2 Award notification and contracting

ECOCEANOS intends to announce the selected organization on 2 May 2023. The selected applicant will receive a written notice describing the next due-diligence and contracting steps. Unsuccessful applicants will be informed after the decision. ECOCEANOS may request adjustments to indicators, budget lines or sequencing before contract signature when the core project remains unchanged. Negotiation cannot increase the grant above USD 100,000. If negotiations fail, ECOCEANOS may approach the next-ranked applicant.

The funding agreement will incorporate the approved proposal, budget, results framework, payment schedule and reporting obligations. Where the documents conflict, the signed agreement and its annexes will govern. No applicant should incur costs in reliance on the award announcement before the agreement becomes effective. ECOCEANOS will not reimburse pre-award expenditure unless the agreement explicitly identifies an approved exception.

12. Safeguards, Ethics, Procurement and Risk Management

A tourism project that uses biodiversity as its principal asset must avoid creating new ecological pressure. The implementing organization is responsible for screening every activity for foreseeable environmental and social risk. Visitor promotion must not disclose sensitive nesting, breeding or collection locations when disclosure could increase disturbance. Infrastructure must remain small-scale and compatible with local rules. Wildlife handling is not expected under this call. If the proposed intervention includes research or monitoring that requires permits, the applicant must identify the responsible authority and obtain authorization before the regulated activity begins.

Community participation must be voluntary and based on clear information about the project. The organization must avoid creating the expectation that every participant will receive direct income. Where tourism benefits are likely to be concentrated among operators, the proposal should explain how conservation responsibilities and community benefits will be balanced. In collective territories, customary authorities must be respected. The project must use accessible grievance channels so that residents can report exclusion, environmental damage, harassment, financial concerns or other project-related problems without retaliation.

12.1 Protection and inclusion

Activities involving children or adolescents require appropriate safeguarding measures and adult supervision. Photographs and public stories must use informed consent. The implementing organization must prevent sexual exploitation, abuse and harassment by staff, contractors or partners. Project recruitment and training should provide fair access to women and younger adults. Inclusion targets should reflect the local population rather than impose categories that have no territorial relevance. The selected organization will identify a safeguarding focal point in the inception report and will immediately notify ECOCEANOS of any serious incident related to project personnel or activities.

12.2 Procurement and conflict of interest

Grant-funded procurement must be economical, documented and proportionate to value. The implementing organization may use its existing procurement policy when it provides adequate competition and conflict controls. For significant purchases, the organization should obtain multiple comparable quotations unless a sole-source justification is documented. Staff or board members must disclose personal or financial interests in potential suppliers. Related-party transactions require prior written approval from ECOCEANOS. Procurement records must allow a reviewer to understand what was purchased, why the supplier was selected and how the cost relates to an approved activity.

12.3 Risk management

The proposal must include a risk register with probability, consequence, mitigation measure and responsible person. At minimum, the register should address weather or access disruption, community or governance conflict, underperformance of tourism demand, ecological harm caused by visitation, procurement delay and financial control failure. Security risks should be included where relevant to the territory. The organization must update the register quarterly. A high-risk event that could materially affect people, biodiversity, grant funds or the completion date must be reported to ECOCEANOS promptly with a proposed response.

ECOCEANOS may suspend an activity when evidence indicates that continued implementation could cause serious environmental or social harm. The organization will then investigate and propose corrective action. Suspension of one activity does not automatically suspend the entire project when other components can continue safely. The objective is to protect people and ecosystems while maintaining delivery where possible.

13. Reporting, Communications, Data and Project Closeout

Reporting will combine concise management information with milestone documentation. The implementing organization will provide monthly dashboards, a midterm technical and financial report, and a final report. The midterm report will accompany the request for the third payment. It must compare progress with the approved results framework and explain variances. The final report will present endline values, assess each contractual result and reconcile expenditure to the approved budget. Financial reports must be supported by the organization's accounting records and must identify any unspent balance or disallowed cost.

13.1 Financial accountability

The selected organization must maintain a project ledger or equivalent cost center that allows ECOCEANOS to trace grant expenditure. Original supporting documents may remain in the organization's records when local accounting rules require it, but they must be available for inspection. Currency conversions must use a documented and consistently applied method. The final financial package will include a transaction-level expenditure report, bank reconciliation for the project account or cost center, and an asset register for durable items purchased with grant funds. ECOCEANOS may require an external audit when due diligence or project performance indicates that additional assurance is necessary.

13.2 Communications and acknowledgement

The selected organization may communicate the project publicly once the funding agreement is effective. Public materials should acknowledge ECOCEANOS CORPORATION as the funding organization and should describe the purpose of the grant accurately. Communication should not reveal sensitive biodiversity locations or personal information without consent. ECOCEANOS may request project photographs, short beneficiary stories and verified results for institutional reporting. The implementing organization retains responsibility for obtaining the rights needed to share material. Publicity should support the destination's conservation rules rather than promote visitation to sensitive sites beyond agreed capacity.

13.3 Data ownership and use

Primary project data will be managed by the implementing organization in accordance with applicable law and community agreements. ECOCEANOS will have the right to use aggregated project data and final deliverables for monitoring, learning and non-commercial institutional communication. Sensitive community or biodiversity data may be restricted through the data-management plan. Applicants should identify any pre-existing intellectual property used in the project. Materials developed with grant funding should be available for continued local project use after closure.

13.4 Closeout

Project closeout is complete when ECOCEANOS has accepted the final technical and financial reports, verified the asset register, resolved outstanding advances and confirmed the disposition of any unspent funds. The organization must preserve project records for at least five years after closure or longer when national law requires it. The final payment may be released only after the closeout package is accepted. Acceptance of the final report does not waive the obligation to correct a later-discovered material financial irregularity.

Within sixty days after the formal end date, ECOCEANOS may convene a learning session with the implementing organization and selected local actors. The purpose is to document which tourism mechanisms produced actual demand, which conservation rules were enforceable, and which monitoring indicators were practical for communities. The learning record may inform future ECOCEANOS funding. Participation in this session does not create an obligation for additional financing.

Annex A. Reference Results Framework

Applicants may adapt the structure below to the selected territory. The final contractual results framework will be negotiated after selection and approved before Milestone 2. Targets shown here are minimum operating expectations established by these Terms of Reference. The proposal should add site-specific ecological indicators and may increase the targets when evidence supports a larger but still manageable scope.

Level	Statement	Indicator / target	Means of verification	Key assumption
Objective	Tourism generates measurable local value while supporting biodiversity conservation in one Colombian destination.	Tourism-performance indicator improves by at least 15% where baseline comparability allows; ecological pressure indicator meets approved target.	Baseline/endline, operator records, field monitoring.	External shocks do not prevent all visitation during the final measurement period.
Outcome 1	Visitor use is managed according to ecological evidence.	Approved visitor-management protocol applied by local operators.	Protocol, operator records, field verification.	Local authority supports practical enforcement.
Outcome 2	Local tourism products create conservation-compatible income opportunities.	At least 4 products or routes operational.	Pricing sheets, bookings, tests, visitor feedback.	Products can reach viable market channels.
Outcome 3	Community stewardship becomes routine.	60 trained people and 25 monitoring points/equivalent operating.	Training assessments, monitoring logs.	Participants remain available across project seasons.
Outcome 4	Local mechanism can continue after grant closure.	One governance/financing mechanism with at least 2 endorsements.	Agreement, minutes, operating rule.	Local organizations retain interest and authority.

Annex B. Milestone Acceptance Checklist

Milestone	Required evidence before ECOCEANOS approval
1 - Contract effectiveness	Signed agreement; verified banking; due diligence completed; approved starting budget and results framework.
2 - Baseline and management design	Territorial baseline; stakeholder map; focal biodiversity indicators; visitor-management protocol; conservation action plan; updated risk register; expenditure report for Tranche 1.
3 - Midterm performance	At least 60% of planned outputs complete; four tourism products designed and tested; monitoring network operational; training progress documented; satisfactory financial report; corrective actions closed or controlled.
4 - Final closeout	Endline dataset; final technical report; final financial report; asset register; sustainability mechanism; partner/community endorsements; reconciliation of unspent funds.

Annex C. Application Compliance Checklist

- Application received by 2 April 2023 at 23:59 Colombia time.
- Applicant is a legally constituted Colombian organization and can receive international grant funds.
- Project is located in one coherent Colombian tourism destination or ecological corridor.
- Request is exactly USD 100,000 and implementation period is compatible with 2 September 2023 to 1 September 2024.
- Project directly links tourism promotion with measurable biodiversity conservation.
- Proposal includes results framework, budget, schedule, risk analysis and sustainability mechanism.
- Mandatory legal and financial organizational documents are attached.
- Required partner or territorial authorization pathways are identified.

ECOCEANOS reserves the right to interpret these Terms of Reference for purposes of administering the competitive process, provided that all applicants are treated consistently. Any formal amendment issued before the closing date will become part of the call documentation. Submission of an application constitutes acceptance of the evaluation process and acknowledgement that the award remains subject to due diligence and signature of the funding agreement.

For official correspondence regarding this call, applicants must contact Juan Diego Correa Hernandez at manager@ecoceano.org. The call reference ECO-TOURBIO-2023-01 should be included in the subject line of all correspondence.