

# Evaluation of Lessons Learned to Inform Reinvestment in the Madagascar and Indian Ocean Islands Biodiversity Hotspot.



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**Report for CEPF by  
Emerald Network Ltd.**



## **ABBREVIATIONS AND ACRONYMS**

CEPF	Critical Ecosystem Partnership Fund
CfP	Call for Proposals
COS	Comite des Oeuvres Sociales
CSO	Civil Society Organization
EP	Ecosystem Profile
KBA	Key Biodiversity Area
KI	Key Informant
Lol	Letters of Inquiry
MADIO	Madagascar and Indian Ocean Islands
RIT	Regional Implementation Team
TMF	Tany Meva Foundation
ToR	Terms of Reference

## EXECUTIVE SUMMARY

This evaluation assesses the performance and lessons learned of the Critical Ecosystem Partnership Funds' (CEPF) incumbent Regional Implementation Team (RIT) in the Madagascar and Indian Ocean Islands (MADIO) hotspot, which includes the Comoros, Madagascar, Mauritius and Seychelles. The current period of CEPF investment in the hotspot spans seven years, January 2015 to June 2022 and totals USD 12.27 million. The Tany Meva Foundation (TMF), a Malagasy organization, has been the RIT throughout this period. With reinvestment planned for another 10 years, this evaluation assesses the challenges, opportunities and lessons learned associated with the RIT role. In combination with a separate final assessment of the results of hotspot investment, this evaluation will enable future applicants for the RIT role to be better informed about previous experience and results achieved, and create a more competitive environment for future RIT applicants.

A participatory and consultative approach was used to conduct the evaluation, with desk review of key documents, remote interviews carried out with key informants (KIs) and an online survey sent to all CEPF grantees in the hotspot. An evaluation matrix was used to guide questions based on the evaluation criteria and themes specified in the Terms of Reference: relevance, efficiency, effectiveness, coverage, impact, accessibility and adaptive management. Given the large number of documents, KIs and CEPF grantees in the hotspot, a strategic sampling approach was applied to prioritize data collection. The evaluation was also limited to information that could be accessed remotely. In total, 21 KIs from CEPF, TMF, the RIT and grantee stakeholder groups were interviewed in either English or French. 35 grantees responded to the online survey, with a better than expected response rate achieved; however the majority of responses were from grantees whose project(s) was based in Madagascar (n=24), with seven in Comoros and four in Mauritius. Despite reminder emails sent to encourage further responses, no grantees from the Seychelles responded to the survey.

Overall, the RIT has largely performed its duties well with a sizable and balanced portfolio of grants achieved during this investment period, reflecting the strategic directions and priorities of the ecosystem profile for the hotspot and the relative size and needs of each country. However, this was not without a series of challenges. The RIT experienced a high turnover of staff during the first few years, resulting in limitations to their capacity and function during this time. This has improved significantly in recent years, with the current TMF Executive Director and RIT Team Leader providing stability. RIT processes were highlighted as initially being slow and restrictive, with long delays in the awarding of small grants at the beginning of the investment period. However, the RIT and TMF responded well to suggestions from CEPF to improve its processes, and relations between the organization and CEPF are good. These improvements will have lasting benefit in the region given their contribution to the capacity building of this Malagasy

organization. In addition, the RIT has faced significant external challenges with political instability in Madagascar in particular, and significant environmental threats. Being an organization embedded in Madagascar, it is clear that the RIT understood the needs and context in the country well, and this is reflected in the large number of grants in the country and the support felt by grantees there. However, with no presence in the other countries in the hotspot a consultancy model was used to support grantees in Mauritius, Comoros and Seychelles. This was largely perceived as resulting in weaker support to grantees in those countries, not due to a fault of the consultants but because recruitment was delayed and it presented additional administration. Overall, the RIT's communication of the CEPF programme in the hotspot could have been strengthened and networks identified and utilized, especially in the Indian Ocean Islands. The investment period did not result in the strong regional collaboration of civil society as was intended. This was largely due to less demand for these types of projects from grantees, but also reflects weaknesses in the RIT's approach to encouraging this type of grantee exchange and identifying regional opportunities.

Lessons learned from this evaluation include the need to strengthen the presence of the RIT beyond Madagascar to the Indian Ocean Islands, and improve communication throughout the hotspot to help foster regional networking and collaboration. One recommendation is that stronger presence in all of the countries should be established very early on during the next investment period to avoid delays. Also, whilst staff changes are largely outside the RIT's control, delays to processes need to be identified and reported on faster to minimize the effect on the development of the portfolio. This is also true for the mid-term assessment, which ideally should be carried out before the majority of grant allocation has taken place so that any necessary adaptation can take place at the portfolio level. Given the size of the portfolio, another recommendation is that the potential benefits of geographic priorities for investment be examined during the next ecosystem profile, for example by maximizing efficiency through more concentrated project localities. Finally, having a local organization embedded in Madagascar has provided many benefits, including deep understanding of the local context in Madagascar in particular as well as improving the capacity of this local organization, which is a significant aim of CEPF.

Finally, the authors of this report would like to thank all KIs and grantee survey respondents for their time and contribution to this work.

# INTRODUCTION

## EVALUATION PURPOSE

This evaluation seeks to assess the performance and lessons learned of CEPF's incumbent Regional Implementation Team (RIT) in the Madagascar and Indian Ocean Islands (MADIO) hotspot, which includes the Comoros, Madagascar, Mauritius and Seychelles.

The current period of CEPF investment in the hotspot spans seven years, January 2015 to June 2022 and totals USD 12.27 million. The [Tany Meva Foundation](#) has been the RIT throughout this period. With reinvestment planned for another 10 years, this evaluation will assess the challenges, opportunities and lessons learned associated with the RIT role.

In combination with a separate final assessment of the results of hotspot investment, this evaluation will enable future applicants for the RIT role to be better informed about previous experience and results achieved, and create a more competitive environment for future RIT applicants.

## CEPF INVESTMENT IN THE MADIO HOTSPOT

The current MADIO hotspot ecosystem profile (finalized in December 2014) identifies the CEPF niche for the current phase of investment in the region (2015-2022). The profile is based on a participatory process involving national, sub-regional and expert consultations as well as a geographical prioritization process that focuses on a subset of Key Biodiversity Areas (KBAs) and corridors, commensurate with available funding. This is based on several criteria, including biodiversity priority, past and current donor investment levels, significant threats and provision of ecosystem services.

The niche also reflects CEPF's variable levels of funding, with its small as well as large grants programme. The small grants programme is intended to support and strengthen local organizations implementing site-based conservation actions, enhancing local ownership and mainstreaming biodiversity conservation in development policies and business practices with multiple stakeholders. The grants programme also aims to support regional collaborations among civil society organizations, fostering the emergence of a regional conservation community that has so far been lacking.

The ecosystem profile identifies seven priority corridors or clusters in Madagascar, plus three other sites, totalling 38 priority KBAs in Madagascar and 19, 9 and 12 priority KBAs for the Comoros, Mauritius and the Seychelles respectively. Most of these sites focus on ecosystems that have extraordinary biodiversity but so far have been underfunded relative to other ecosystems: wetlands and freshwater bodies, dry forests, coastal and near-shore marine areas. The disparity in priority sites between the hotspot countries reflects the disparity in terms of land mass, human

population, economic services and environmental degradation. Madagascar comprises the majority of the hotspot with c.95% of the land area, and being home to c.98% of the population. Madagascar and the Comoros are categorized by the United Nations as among the world's least developed countries whereas the Seychelles and Mauritius can be considered as emerging economies. The hotspot contains globally significant levels of diversity and endemism, but degradation of natural systems is very high, with significant deforestation and habitat loss across all countries, in particular Madagascar.

The Tany Meva Foundation (TMF), created in 1996, is a Malagasy institution that provides sustainable financing of environmental projects undertaken by local and community organizations. TMF has two main roles, to generate financial resources and to finance projects. Since inception, TMF has supported more than 2,000 projects for a total amount of US\$ 14.8 million, on issues covering reforestation, renewable energy, alternative livelihood activities, biodiversity conservation and environmental education.

TMF was recruited as the RIT for the MADIO hotspot when the current CEPF investment strategy started in the region in February 2015. The overall budget for the hotspot is US\$ 12,278,855 which comprises an allocation from the CEPF global donors supplemented by additional funds from the Leona M. and Harry B. Helmsley Charitable Trust. This budget includes the RIT budget to carry out their Terms of Reference, as well as budget for the portfolio of small and large grants throughout the hotspot. The current phase of CEPF's investment in the region, for which TMF is the RIT, is guided by the four strategic directions and 10 investment priorities set out in the ecosystem profile (Table 1).

Table 1. Strategic directions and investment priorities in the MADIO hotspot

Strategic Direction	Investment Priority
1. Empower local communities to protect and manage biodiversity in priority KBAs.	1.1. Support local communities to design and implement locally relevant conservation and sustainable management actions that respond to major threats at priority sites.
	1.2. Support the development of economic models to improve both livelihoods and biodiversity conservation.
	1.3. Build the technical, administrative and financial capacity of local organizations and their partners.
2. Enable civil society to mainstream biodiversity and conservation into policy-making and business practices.	2.1. Support local research institutions to improve basic knowledge of biodiversity or priority ecosystems.
	2.2. Support civil society to disseminate biodiversity information and influence political and economic decision-makers in favor of biodiversity and conservation priorities.

	2.3. Explore partnerships with private sector stakeholders to promote sustainable practices that deliver positive impacts for conservation.
3. Strengthen civil society capacity at national and regional levels through training, exchanges and regional cooperation.	3.1 Foster the emergence of a new generation of conservation professionals and organizations through small grants for technical and practical training.
	3.2 Encourage exchanges and partnerships between civil society organizations to strengthen conservation knowledge, organizational capacity, management and fundraising skills.
4. Provide strategic leadership and effective coordination of CEPF through a RIT	4.1 Make operational and coordinate the allocation and monitoring process of the CEPF grants to ensure effective implementation of the strategy.
	4.2 Foster the emergence of a conservation community beyond institutional and political boundaries to achieve conservation objectives.

## METHODS & LIMITATIONS

### METHODS

This evaluation was conducted by consultants Dr Julia Latham and Dr Glwadys Gbetibouo between October 2021 and January 2022, with quality assurance provided by Dr John Colvin, Executive Director of Emerald Network Ltd.

To achieve the aims of this evaluation, a participatory and consultative approach was adopted. This began with a desk review of key documents pertaining to CEPF and the MADIO RIT, listed in Annex 1 of this report. As a data collection and analysis tool, an evaluation matrix (Annex 2) was formulated based on the evaluation criteria and themes specified in the Terms of Reference for this evaluation (Annex 3).

#### Evaluation Criteria:

- Relevance
  - *Were the activities undertaken relevant to the ecosystem profile, RIT terms of reference, the geography of the hotspot, the capacity of civil society there, and the global monitoring framework of CEPF?*
- Efficiency
  - *How efficiently was the budget allocated to the RIT converted into results?*
- Effectiveness
  - *What were the strengths and weaknesses of the RIT structure and capacities regarding effective delivery of results?*

#### Evaluation Themes:

- Coverage
  - *To what extent does the portfolio of grants awarded to date cover the strategic directions and investment priorities set out in the investment strategy for the hotspot?*
- Impact
  - *To what extent have the targets set in the hotspot ecosystem profile for impacts on biodiversity conservation, human wellbeing, civil society capacity and enabling conditions been met?*
- Accessibility
  - *Does the grant portfolio involve an appropriate balance of international and local grantees, considering the relative strengths of different organizations regarding delivery of the investment strategy and considering the priority given by CEPF to building the capacity of local civil society?*
- Adaptive Management
  - *In what ways has the development of the grant portfolio been constrained by risks (political/institutional/security/health) or taken advantage of unanticipated opportunities?*

A list of key informants (KIs) was developed based on early conversation with Nina Marshall, Senior Director, Monitoring, Evaluation and Outreach at CEPF and Monique Vieille, the MADIO



Hotspot Grant Director as well as through examination of the RIT Organizational Chart. Informants were organized by their stakeholder group and questionnaires for each group were developed based on the evaluation matrix. A sample of KIs was selected from this list for interview (see also limitations), with additional KIs that were identified during the initial interview process added to the sample and contacted for interview.

Given the large number of grantees in the hotspot (n=92), a Google Survey was designed and sent to all MADIO hotspot grantees to canvas their experience and perceptions in both English and French (Annex 4). In total, the survey was sent to 89 organizations and 116 individuals (seven emails bounced back, mostly as addresses were no longer in use). A simple survey design was chosen to optimize response rate (with an aim of 20%), with largely sliding scale and multiple choice questions pertaining to grantees' knowledge and understanding of CEPF, their opinion on the application process and their experience with the RIT. At the end of the survey, respondents were asked if they would be willing to discuss this topic further in an interview. Of the 17 that responded positively (see Results), four grantees were selected for an interview. An additional grantee was identified during the interview process and added to the sample, and so five grantees were interviewed in total. Respondents for interview were selected based on the country their project was located in and the size of the grant they received, with the aim of representing all four countries in the hotspot and both small and large grants. This resulted in two grantees from Madagascar selected for interview (representing one large and one small grant given the large share of grantees in this country) and because no grantees from the Seychelles responded, one from Mauritius (small grant) and one from the Comoros.

In total, 21 KIs were interviewed remotely between 10th November and 23rd December 2021 and in either English or French depending on their preferred language, using video conferencing software. A complete list of persons interviewed is provided in Annex 5.

Data relating to the number and value of grants awarded was analysed and their distribution according to the pillar of the grant, geography and the type of grantee organisation was summarised. This data was obtained from records provided by the CEPF Secretariat to the Evaluation Consultants in the spreadsheet 'MADIO - All Grants- Oct. 21.xlsx', extracted from CEPF's records on 7th October 2021. Similarly, data on grants allocated to each strategic direction was analysed using records provided by the CEPF Secretariat to the Evaluation Consultants in the spreadsheet 'MADIO grants with SDs.xlsx', extracted from CEPF's records on 3rd November 2021.

## LIMITATIONS

The level of effort allocated and contracted by CEPF for this evaluation was 20 days. Given the large number of documents, KIs and CEPF grantees in the hotspot, a strategic sampling approach was applied to prioritize data collection within the limited timeframe. With no in-country visits possible (as instructed in the ToR) due to the travel restrictions imposed by Covid-19, this evaluation was limited to information that could be accessed remotely. The methods used ensured desk-based information could be complemented and triangulated by KI interviews and

the online survey.

Priority was assigned to informants that played key roles associated with the performance of the RIT and to documents that pertained to particular evaluation criteria or summarized RIT performance (such as the mid-term evaluation report and the annual portfolio overviews). A total of 20 interviews were planned and priority was first given to informants that played key roles associated with the performance of the RIT. During the interview process, two additional KIs were identified and also contacted for an interview, while one informant from the RIT stakeholder group did not respond to interview requests.

## RESULTS

During the current phase of investment, nine calls for proposals were issued and 127 grants were awarded in total (n= 61 small grants; n= 66 large grants) to 92 grantees (19 grantees received more than one grant), of which 82 (65%) projects are currently closed. This is one of the largest portfolios of grants within a CEPF hotspot. In total, \$10,987,023.94 of grants have been awarded (excluding the RIT grant), and despite there being near equal numbers of small and large grants, 90% of this was allocated to large grants and 10% to small grants, reflecting the larger budget size of large grants. Large grants are managed directly by the CEPF Secretariat, whereas small grants are managed by the RIT.

### RIT TIMELINE

The RIT experienced significantly high turnover of staff due to governance issues during the first half of the investment phase, starting with the Team Leader resigning in 2016. This role then changed hands a further three times before the current Team Leader Monique Randriatsivry took over the role in July 2019. During this time, Project Managers also fluctuated until the positions were taken up by the current staff Anicet Josué Rakotoarisoa, Rivo Fanomezantsoa Andriatsimatahomanana and Rindra Nantenaina Andriamahefasoa in April and September 2019. Significantly, in May-June 2018 TMF hired Claude Fanohiza as the new Executive Director, and Pierre Carret was replaced by Monique Vieille as CEPF Grant Director for MADIO hotspot. Collectively, this created significant flux for the RIT given the ensuing time delays for new staff members to familiarize themselves with their roles and re-establish working relationships. Also in June 2018, a high profile Supervision Mission to the RIT and its Board was conducted by CEPF Executive Director Olivier Langrand and the Chair of CEPF's Donor Council Julia Marton-Lefèvre. The purpose of this mission was to clarify roles and responsibilities between the RIT Team Leader and TMF's Board, to address identified limitations and increase the capacity of TMF's Executive Director to execute decision-making with regard to small grant management. These events, along with other significant events during TMF's incumbency as RIT are outlined in a RIT Timeline (Table 2).

Table 2. Timeline indicating key events during Tany Meva Foundation's incumbency as RIT.

Date	Event
February 2015	TMF recruited as RIT for MADIO hotspot
March 2015	CEPF & RIT 1st Supervision Mission to the Comoros
April 2015	CEPF & RIT 2nd Supervision Mission to Mauritius
January- February 2016	CEPF & RIT 3rd Supervision Mission to TMF. Processes for grant review and awarding reviewed extensively after protracted notification and awarding of first call for proposals
July 2016	CEPF & RIT 4th Supervision Mission to the Seychelles and exchange

	with Eastern Afromontane hotspot RIT (BirdLife International and partners)
September 2016	Monique Randriatsivery replaces Manitra Randrianarijaona (who had been in position since program inception) as Project Manager. Project Manager Aina Hantavololona also leaves
December 2016	RIT Team Leader Ravaka Ranaivoson resigns
February 2017	Alain Randriamaherisoa hired as new RIT Team Leader
February 2017	CEPF & RIT 5th Supervision Mission to Madagascar
September 2017	CEPF & RIT 6th Supervision Mission to Madagascar and the Comoros
January 2018	Claude Fanohiza hired as Executive Director of TMF
January 2018	Mahandry Rakotovao hired as Project Manager
January 2018	Two consultants hired on part-time basis as national representatives: Olivier Tyack is based in Mauritius and provides support to grantees in Mauritius and Seychelles, and Sohibou Mhoumadi is based in the Comoros and provides support for grantees in this country
January 2018	CEPF & RIT 7th Supervision Mission to Antananarivo to provide basic operational training to the RIT
January 31st 2018	RIT Team Leader Alain Randriamaherisoa leaves TMF
February 2018	New RIT Team Leader Ramanarivosoa Tolojanahary hired
March 2018	Eric Ramarijaona joins as CEPF Grant Manager
April 30th 2018	RIT Team Leader Ramanarivosoa Tolojanahary resigns; the ensuing leadership vacuum remains for the last two months of FY18
May 2018	Pierre Carret is replaced by Monique Vieille as CEPF Grant Director for MADIO hotspot
June 2018	Miara Rajaobelina, the last Project Manager since program inception, resigns
June 2018	CEPF & RIT 8th (and final) Supervision Mission: High profile visit from CEPF Executive Director Olivier Langrand and the chair of CEPF's Donor Council (Julia Marton-Lefèvre) to TMF and its board, and introduction of new grant director Monique Vieille
July 2018	CEPF's global donors increase the spending authority for the MADIO hotspot, and extend timeline to September 2022

July 2018	Rija Ranaivoson hired as RIT Team Leader
Early 2019	Mahandry Rakotovao resigns as Project Manager
April 2019	Combined financial technical supervision visit in the Comoros and Madagascar
April 2019	Current Project Manager, Anicet Josué Rakotoarisoa, starts in position
June 2019	Current Finance and Administration Officer Herivola Andriampenomanana is promoted to the position after the previous Finance and Administration Officer Patricia Ontonia, who had been in the position since program inception, leaves
July 2019	Monique Randriatsivery, a former project manager, succeeds Rija Ranaivoson as RIT Team Leader
July 2019	1st Financial supervision mission conducted
September 2019	Current Project Managers, Rivo Fanomezantsoa Andriatsimatahomanana and Rindra Nantenaina Andriamahefasoa, start in position
October 2019	1st Mid-term assessment workshop in Nosy Be, Madagascar, attended by grantees, local government and CEPF's donor partners
December 2019	2nd Financial supervision mission conducted
December 2019	2nd Mid-term assessment workshop in Antananarivo, Madagascar, attended by grantees, local government and CEPF's donor partners
March 2020	No further formal RIT supervisions conducted (mid-term evaluation is the last) due to Covid-19. However, the RIT carried out 12 supervision missions to 10 large and 20 small grants (25 in Madagascar, 4 in Comoros) during FY21
April 2020	Olivier Tyack, the consultant covering Mauritius and the Seychelles resigns for personal reasons. The Secretariat jointly with the RIT decides that given the few projects (and mostly large grants) that are still active in these islands, no other consultant would be needed for the remainder of the investment period
Oct 2020	Communications Manager Randrianarivelo Miharintosa, who started in February 2019, leaves and is replaced by Andrianantenaina Doda Fanomezantsoa who starts in August 2020 and leaves in May 2021. The position is then changed to Manager of External Relations to be broader than Communications, and Nary Rasolofoniaina is recruited in October 2021
Jan 2021	Eric Ramarijaona resigns from position of Grant Manager with the

	CEPF Secretariat
Oct 2021	Soihibou Mhoumadi's contract ends, as projects in the Comoros are winding down
Nov 2021	Annie Kaufmann joins as CEPF Grant Manager

## GRANTEE SURVEY RESULTS

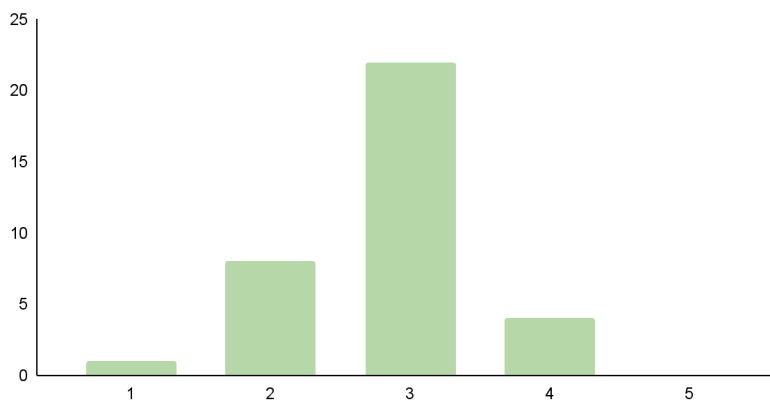
The online survey approach was used to maximize responses from grantees in the time available. In total, 35 responses to the online grantee survey were received (French version n=30, English version n=5). This is a 39% response rate of organizations contacted (n=89). Whilst this is a better than expected response rate, the majority of responses were from grantees whose project(s) was based in Madagascar (n=24), with seven in Comoros and four in Mauritius. Despite reminder emails sent to encourage responses, no grantees from the Seychelles responded to the survey.

Of the respondents, 18 had received small grants, 13 had received large grants and 4 had received both. 77% of respondents indicated they knew about CEPF and its mission and objectives in the MADIO hotspot either well or very well, and an equal number of respondents heard about CEPF grants either through TMF (n=16) or through CEPF directly (n=16).

In general, the majority of respondents were neither satisfied nor dissatisfied with the ease of the grant application process or the response time of grants (Figure 1). Of those that provided further comment (n=12), 33% stated that the process was too complex and administratively cumbersome, whilst 50% stated that the process was too lengthy, with a long delay between submission of the letter of inquiry and start of the project.

When asked if it was clear who at TMF they could approach with questions or problems and how to contact them, 88% of respondents said yes. All but one respondent indicated receiving support from TMF: with 71% having received site visits, 38% training assistance, 56% technical assistance in project monitoring and reporting, 41% technical assistance in project implementation and only 18% in project design. However, less than half of respondents (44%) stated that TMF had helped them to address risks or unexpected situations.

On a scale from 1 to 5, how easy is the CEPF grant application process? (1=not at all easy, 5=very easy) (n=35 respondents)



On a scale 1 to 5, how satisfied were you with the response time of the CEPF grants? (1=not at all satisfied, 5=very satisfied) (n=34 respondents)

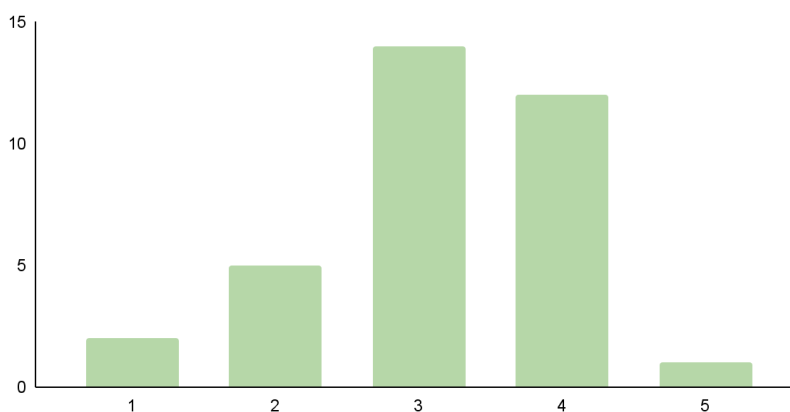


Figure 1. Respondent satisfaction with the CEPF grant application process.

The majority of respondents (71%) stated that TMF had sufficiently explained the strategic directions in the ecosystem profile. Over half of respondents (60%) stated that TMF had helped to connect them with other grantees in the hotspot, whereas only 32% stated that TMF had helped to connect them with other stakeholders (e.g. government/private sector/other donors/CSOs). When asked to comment on what was most positive about TMF as the RIT for the MADIO hotspot, 25 respondents provided comments ranging from constructive advice and assistance with the project and the ease of communication with TMF. When asked to comment on what was most negative about TMF as the RIT for the MADIO hotspot, 20 respondents provided comments ranging from complications due to staff turnover, cumbersome procedures, financial delays and lack of technical biodiversity expertise.

When asked how the RIT could improve its work, 23 respondents provided comment with four of these recommending more grantee exchanges to enhance regional learning and support, and seven recommending more frequent communication and virtual meetings, however one respondent stated that *“it would be good to have a more direct dialogue with the implementation team but, to be honest, in a way, it has been good that we have just been able to get on with the project field work without spending more time in meetings etc. It is a hard balance to get right!”*. Simplification and speeding up of administrative processes was recommended by two of the respondents, and one (with a project in Mauritius) stated that *“The RIT must be more Western Indian Ocean focused, even if there will be more projects in Madagascar. The focus has been very strongly Madagascar and the ‘smaller Indian Ocean Islands’ less prioritized”*, whilst another with a project in Comoros stated that *“We really did not feel the presence of the RIT in our project as has happened in other hotspot regions we have worked in”*.

## RELEVANCE

### Relevance to Ecosystem Profile and the geography of the hotspot

Overall, KIs agreed that the grant portfolio was well executed in terms of alignment with the eligibility criteria related to the strategic directions and investment priorities. The portfolio has been described as *“balanced”* and reflecting the investment niche of the ecosystem profile well. To help with decision-making on awarding of small grants, the RIT used a committee of technical experts to review and advise on grant applications. At the time of the Mid-term Assessment in December 2019, CEPF had funded activities at 60 of the priority KBAs in the hotspot identified in the ecosystem profile (35 of 38 prioritized sites in Madagascar, 15 of 19 prioritized sites in the Comoros, three of 12 prioritized sites in the Seychelles and seven of nine prioritized sites in Mauritius). The large majority of grants was awarded to the Biodiversity pillar, with roughly equal number of grants and spending allocated to the remaining Civil Society, Enabling Conditions and Human Wellbeing pillars (Table 3).

Table 3. Distribution of grants and budget by pillar (NB. Information on three grants was not available; Source: MADIO - All Grants- Oct. 21.xlsx).

Pillar	Number of grants	% of grants	Allocation of budget (USD)	% Allocation of budget
Biodiversity	82	66%	7,111,117.14	65%
Civil Society	16	13%	1,416,813.37	13%
Enabling Conditions	12	10%	1,230,393.27	11%
Human Wellbeing	14	11%	1,118,729.42	10%



<b>Total</b>	<b>124</b>	<b>10,987,023.94</b>
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The majority of grants have been awarded in Madagascar (Table 4), reflecting the prioritization of this country in the ecosystem profile and the difference in how the RIT has been able to work in Madagascar and the other islands. TMF is established in Madagascar, and CEPF is well known there as they have had a presence in the country for the past 20 years. However, this phase of investment is the first on the other islands, where TMF does not have a local presence and there were more challenges to overcome. Nonetheless, the RIT was cited as helping to establish communication about the CEPF program on the other islands, although this could be strengthened.

A number of small errors and inaccuracies within the ecosystem profile have been noted, however these are very minor (e.g. spelling mistakes, improper names for sites). The mid-term assessment raised the issue that the profile describes the priority sites and corridors as well as the rationale for selecting them, but does not provide further guidance such as whether all priority sites should have at least one CEPF project or whether it would be best to have multiple projects in some of these sites. However, the assessment concludes that the portfolio of grants has grown organically, and that any gaps are fairly limited except for the underrepresentation of grants in the Seychelles (see Coverage). One recommendation for this is that the next funding phase would benefit from having geographic budget allocation targets at the country level.

Table 4. Distribution of grants and budget by country (Source: MADIO - All Grants- Oct. 21.xlsx)

<b>Country</b>	<b>Number of grants</b>	<b>% of grants</b>	<b>Allocation of budget (USD)</b>	<b>% Allocation of budget</b>
Comoros	11	9%	1,225,410.30	11%
Regional projects (Comoros; Madagascar; Mauritius; Seychelles)	3	2%	6,278,80.98	6%
Madagascar	95	75%	7,257,816.38	66%
Mauritius	10	8%	1,309,151.34	12%
Seychelles	8	6%	566,764.94	5%
<b>Total</b>	<b>127</b>		<b>10,987,023.94</b>	

## Relevance to RIT Terms of Reference

The Terms of Reference (ToR) for the RIT consists of nine components (Table 5), and 52 associated duties. The components of the ToR are cross-cutting with the criteria and themes of this evaluation, and so to save repetition the relevant section under which each component is discussed in this report is identified in Table 5. When asked, all RIT and TMF staff interviewed were satisfied with the ToR, and indicated that they are keen to continue with the RIT role.

Table 5. The nine duties outlined in the RIT ToR, and their relevance to the specific criteria and themes of this evaluation.

Duties	Evaluation Criteria/Theme
1. Coordinate CEPF investment in the hotspot	Relevance
2. Support the mainstreaming of biodiversity into public bodies and private sector business practices	Impact
3. Communicate the CEPF investment throughout the hotspot	Relevance
4. Build the capacity of civil society	Accessibility
5. Establish and coordinate a process for large grant proposal solicitation and review	Impact
6. Manage a program of small grants of US\$20,000 (US\$50,000 or less in select approved regions).	Coverage
7. Monitor and evaluate the impact of CEPF's small and large grants.	Impact
8. Lead the process to develop, over a three-month period, a long-term strategic vision for CEPF investment.	Relevance
9. Reporting.	Adaptive Management

The mid-term assessment outlines a number of points that were to be revised within the RIT workplan and some of these have since been addressed. The RIT has improved its documenting of networking events within the biodiversity/environmental protection sphere to strengthen collaborative actions, and has produced more communication materials to enhance their visibility, such as by using newsletters and videos on projects as well as a video<sup>1</sup> describing CEPF's work in the hotspot with TMF in December 2019 (however this had only been viewed 23 times). However,

<sup>1</sup> [https://www.youtube.com/watch?v=gOQm\\_2qgZ8A&ab\\_channel=FondationTanyMeva](https://www.youtube.com/watch?v=gOQm_2qgZ8A&ab_channel=FondationTanyMeva)

visibility of CEPF and TMF's role as the RIT in the hotspot on the organization's website could be improved. There are two main pages that refer to the RIT's work on the TMF website<sup>2,3</sup>, although these are not immediately visible without a search function applied. The mid-term assessment also identified the need to strengthen communication and information sharing with authorities, CSOs and stakeholder platforms to support the integration of biodiversity into public policies and private sector practices. Two KIs highlighted that the RIT's communication throughout the hotspot could be improved, especially in the Indian Ocean islands and that this explains the dichotomy in the level of implementation between Madagascar and the other islands. Outside of Madagascar, projects and networking to link the hotspot region have been limited largely due to the lack of TMF presence in the other countries. There is some agreement that networking by the RIT could have been improved, with one KI stating that connections between TMF's own programmes and CEPF's could have been strengthened and capitalized on, as they were perceived to operate in isolation.

The RIT has since developed a communication plan and updated their contact list for the region, however this is not yet available on the RIT Connection Site. This is a site where RITs from all the hotspots can exchange information with each other, however it isn't very active. The RIT has also worked hard to reactivate the social works committee "Comite des Oeuvres Sociales" (COS) since the mid-term assessment. The COS is a group of experts that was gathered at the onset of investment in 2015. The objective of the group was to meet on a regular basis to provide an external view on the portfolio and on specific proposals or grants as needed. The COS met a number of times, however it very quickly became inactive and was not consulted by the RIT. The RIT has now revised the COS list, and these members will be invited to the final assessment of the portfolio in 2022.

Strengthening the capacity of CSOs for the sustainability of the impacts of CEPF funding was also identified as being needed by the mid-term assessment, with the aim of selecting 10 grantees and referring them to specific training opportunities that will help sustain activities beyond investment. However, no formal training of CSOs has happened since the assessment, and this is no longer planned as advised by the CEPF MADIO Grant Director. Relating to the RIT mandate, the mid-term assessment recommended an additional project manager be recruited to strengthen project management capacity, however this was not achieved as a suitable candidate was not found and reduced travel due to Covid-19 meant there was less need. The CEPF Secretariat recommended a consultant be recruited to streamline and simplify the administrative and operational processes of TMF, and AIR Consult have very recently completed this consultancy work and provided a number of recommendations for TMF to implement. This has the potential to significantly build the capacity of this Malagasy organization, presenting lasting

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<sup>2</sup> <https://tanymeva.org/en/our-supported-projects/>

<sup>3</sup> <https://tanymeva.org/en/implementation-of-the-critical-ecosystems-partnership-fund-cepfi/>

benefits for the organization beyond this current phase of investment. However, given the consultancy has only recently completed it is not clear how well these recommendations will be adopted, and external support from AirConsult or the CEPF Secretariat might be needed to implement them. The mid-term assessment also highlights the need to improve the monitoring of the progress and impact of projects through field visits and support to beneficiaries in the implementation of activities, with a backlog of small grants ended but not closed and missing final reports also identified. However, given the onset of Covid-19 shortly after the assessment was completed, travel has been extremely challenging for TMF and outside their control. Nonetheless, KI interviews confirmed missing final reports are now posted under the relevant projects on CEPF's website and the RIT did carry out 12 supervision missions to 10 large and 20 small grants (25 in Madagascar, 4 in Comoros) during FY21, which is an achievement given the travel restrictions imposed by the pandemic. However, this evaluation has found that implementation support to grantees outside of Madagascar was weaker.

### **Relevance to the capacity of civil society in the hotspot**

At the grantee level, informants (via survey and interview) were largely satisfied with the support they received from the RIT and they received training at the start of the project to understand processes. With 92 grantees in the portfolio, this is a significant achievement. Survey results indicate a high level of support to individual grantees by the RIT, in particular through site visits. However, two common themes were that the reporting and financial procedures of the RIT were cumbersome with long delays in awarding small grants, and that the RIT lacked technical expertise in biodiversity and could not always help with technical implementation queries or problems. One suggestion was that the RIT could have addressed this gap in expertise better by helping grantees to identify training opportunities and to identify experts or other grantees with the necessary expertise such as through an online platform, where peers can exchange experiences.

In the Comoros, one informant stated they were happy with the level of training in reporting and implementation. However, many informants agreed that it has been challenging for the RIT to support grantees outside of Madagascar in particular, given the RIT has no local presence there and has largely relied on consultants to manage relationships and provide support (see Effectiveness). One consultant had to cover two countries, which is in itself challenging. Travel to each country has also been restricted in recent years due to Covid-19, meaning many projects have not been visited and grantees have not felt the presence of CEPF and support is limited. However, in Madagascar the support to grantees has been good given TMF is established there and knows the country well. However, it is a large country with many projects, and given poor infrastructure not enough project visits were achieved. It was suggested that perhaps a greater

geographical concentration of projects might be better to improve the ability to provide support in person to grantees.

In the Comoros, there were nearly equal numbers of small and large grants and so the consultant managing the grants in this country had a good relationship with the RIT, as management of these grants was overseen by them. However, in Mauritius and the Seychelles, nearly all of the grants were large grants, and so the consultant managing the projects in those countries communicated directly with CEPF mostly as they have primary responsibility for large grants, and less so with the RIT. This contributed to the feeling that the RIT had less of a presence in these countries, given the disparity in types of grants there. This is largely attributed to the better economic situation in Mauritius and Seychelles, with the small grant ceiling (\$20,000) attracting less attention from civil society there. However, it was also suggested by one informant that this potentially could have been improved through greater awareness raising by the RIT in these countries to attract smaller organizations to CEPF funds.

### **Relevance to the global monitoring framework of CEPF**

Both CEPF and RIT KIs indicated that the logframe guiding the RIT's activities was not very clear or easy to report against, and that indicators could be improved. Where necessary, objective level indicators were revised well and sufficiently explained, however one lesson learned was that where discrepancies in indicators are discovered, these should be flagged to CEPF immediately and not delayed until the mid-term assessment. Reporting against the logframe was described as being time consuming, especially to find the relevant data for each indicator. This was echoed at the grantee level, with some survey respondents indicating that reporting was not easy, and in some cases this resulted in delays to the release of funds, however the RIT were praised for being flexible with reporting deadlines and helpful with guidance. A wide range in terms of capacity for and quality of reporting by grantees is documented, and a need to work more closely with grantees during proposal development to help set realistic targets and clarify CEPF procedures and requirements to applicants. However, both RIT and grantee KIs indicated they liked the online platform for monitoring progress to CEPF and the RIT respectively, and that this helped to provide visibility on progress.

### **EFFICIENCY**

Overall, the RIT has made efficient use of their budget, with a low spending rate and activities performed within budget (the budget allocated to strategic direction 4). In fact, the spending rate was "*lower than CEPF anticipated*". This was partly due to reduced travel needs due to Covid-19, but also due to the high turnover of staff meaning positions were vacant for longer than anticipated. At the time of the mid-term assessment, the identified underspend was reassigned to

the grant portfolio, to address gaps in the strategic directions as described above (see Coverage). Whilst this is good, one informant did suggest that this underspend might reflect missed opportunities to visit more projects (where possible), or conduct more training and regional networking activities. Another KI reinforced this, pointing out that the budget line for communication was not sufficiently used.

In terms of timeframe, the high turnover of RIT staff and time lag in awarding of small grants meant there were delays in completion of activities during the first half of the investment period. At the beginning of the investment period, awarding of small grants took over a year to complete with this being cited as due to complexities in the bureaucratic processes within TMF. As one KI stated “*their processes for awarding small grants was more complex than CEPF’s own processes for awarding much larger grants*”. During this time the RIT did not perform efficiently, as operating costs did not result in activities on the ground. However, with team stability in recent years and advice on processes taken on board during the high profile supervision mission, these delays are now largely resolved. With one of the largest portfolios in the CEPF programme, which is considered overall to be a balanced reflection of the ecosystem profile, the RIT has significantly improved efficiency and overall provided value for money despite the identified gaps in their activities related to communication and regional representation.

## **EFFECTIVENESS**

The effectiveness of the team structure and capacity of the RIT has been a recurring theme throughout this evaluation. As described, the RIT staff saw high turnover during the first half of the investment period, with stability and significant progress with activities only realized in recent years. The high staff turnover presented many difficulties, as it takes time both for new staff to get up to speed with their role and responsibilities as well as for existing staff to re-establish working relationships with new team members. During the first year of investment, communication between the RIT and the CEPF Secretariat was “*very fluid*”. However, the ensuing quick succession of Team Leaders made communication very difficult and required repeated training of roles and responsibilities. This meant progress on tasks was not sufficient and performance was not consistent, and one KI perceived that the lack of consistency within the RIT team structure affected the ability to provide the ideal level of strategic oversight of the portfolio. These challenges were added to by the change in the MADIO Grant Director at CEPF, with similar consequences.

However, communication improved significantly after July 2019, when Monique Randriatsivery was promoted to RIT Team Leader. Relations between CEPF and the RIT are now described as good, with meetings described as being “*very cordial and jovial*” and often involving the Team Leader as well as the Project Managers all in one room. The hiring of Claude Fanohiza as Executive Director is also cited as significantly contributing to improved relationships, with many

KIs referring to Claude and Monique Randriatsivery as a good team. Staff changes were largely outside the RIT control and there is agreement that the RIT is hosted by their own organization, and that as this organization TMF will have its own roles and processes, and that it is not CEPF's role to dictate how they execute the role, but rather to work in partnership with the host organization. Indeed, as one KI stated *"TMF are committed to conservation. They have done very well to recognise their weaknesses and address them and responded well to suggestions from CEPF"*.

The high level of internal bureaucracy that was inherent in the RIT's processes at the beginning of the investment phase limited their capacity to carry out activities. The grant allocation process was too slow and more complex than CEPF's own processes for large grants, and the approval requirements were very limiting. However, these issues were identified and TMF acted upon advice, and clarity in roles was significantly improved in recent years. These improvements were instigated late in the process, with most funds committed, however the benefits of these will have a lasting legacy in the region by improving the capacity of this Malagasy organization. As one KI stated *"the positive aspect of the RIT is that it is a Malagasy organization and a strong local partner, and it has overall performed well. Working with an organization embedded in Madagascar has helped to bring national character to the investment, and resulted in engagement with local entities as well as international organizations. The capacity of TMF has been significantly improved through their carrying out of the RIT role, with processes streamlined, effective leadership and clear understanding of roles now in place"*.

TMF and the RIT are considered to have good understanding of the social and institutional context for development and intrinsic links with conservation. However, they are not perceived to be as strong on the biological elements of conservation, such as the requirements for species conservation. The RIT brought in biodiversity expertise through technical review groups to strengthen this gap, however the grantees are largely considered to be technically capable and so also helped to improve this limitation. This is one area that could be enhanced in the next investment phase, by better utilizing the strengths of grantees through a regional network and peer to peer learning opportunities.

A key weakness has been the lack of presence in the other three countries outside Madagascar. Two consultants were hired in 2018 to address this gap, however there have been challenges with this working model. The length of time it took to procure the consultancies was cited as one limitation, creating delays to implementation in the Seychelles, Mauritius and the Comoros. This meant that regional presence was weak in the beginning of the investment period, and many KIs considered this was not strengthened enough to account for delays. Whilst it was agreed that the consultants carried out their duties well, administration of the consultancies was time consuming for both parties and did not contribute to effective implementation in these countries. This lack of presence was reflected in grantee survey responses, with the perception that the Indian Ocean

Islands were not prioritized and the focus was too strongly on Madagascar. Another implication of weaker in-country presence is weaker relationships with local government, which has proved challenging for the RIT in some cases, in particular in assisting with the granting of permits for projects to proceed.

## **COVERAGE**

Coverage is perceived to be fair across the countries, despite Madagascar having the overwhelming majority of grants and allocation of budget (Table 4). The country is the largest, has more biodiversity, a higher number of CSOs and many environmental problems. There are fewer organizations in Mauritius and the Comoros, and one KI suggested CEPF is working with the main groups, in Mauritius at least. The Seychelles has a stronger civil society with an established diversity of funding in place, and CEPF funding is therefore less significant. This is reflected in there being less interest in the calls for proposals with, for example, only 7 out of 100 letters of inquiry received in the November 2018 call for proposals coming from the Seychelles and perhaps also in the lack of responses from the Seychelles to the online grantee survey. However, in Madagascar the demand for funding greatly outstrips the supply, and CEPF is considered a significant donor although not the largest. However, the large number of grants in Madagascar has also presented logistical challenges in terms of supervision, as the country is large and infrastructure poor, resulting in difficulties for the RIT to visit and manage projects. As previously suggested, future investment phases might benefit from concentrating the geographical distribution of projects.

The majority of grants were allocated to Strategic Direction 1 (Empower local communities to protect and manage biodiversity in priority KBAs), followed by Strategic Direction 2 (Enable civil society to mainstream biodiversity and conservation into policy-making and business practices), with a minority to Strategic Direction 3 (Strengthen civil society capacity at national and regional levels through training, exchanges and regional cooperation) (Table 6). Attempts were made by the RIT to address the gaps in the strategic directions highlighted during each annual portfolio overview. It was reported that demand for projects at the community level and enabling civil society was high, with less demand and capacity for regional projects and so funds were reassigned to increase funds available for SD 1 and 2, and decrease funds for SD 3 and 4 (SD 4 is the budget allocated to RIT to perform its role, as discussed under Efficiency). Overall, the investments for each strategic direction are considered to be well aligned with the priorities identified in the ecosystem profile.



Table 6. Distribution of grants and budget by strategic direction (Source: MADIO grants with SDs.xlsx).

Strategic Direction	Number of grants	% of grants	Allocation of budget (USD)	% Allocation of budget
SD1	72	57%	5,078,927.21	46%
SD2	43	34%	4,133,760.37	38%
SD3	12	9%	1,767,728.79	16%
<b>Total</b>	<b>127</b>		<b>10,980,416.37</b>	

The success rate for applications received for the hotspot was reported as low at the time of the mid-term assessment (9.3%), by which point 91% of the funds were already committed. This was due to the very high number of applications received under the calls for proposals. This presents potential implications for investment, as high rejection rates might deter applicants from applying, especially given the time lag experienced in awarding small grants. One suggestion was that future calls for proposals could be narrower, to focus on one strategic direction or geographic areas for example, so that the response rate can be increased and further calls for proposals addressing remaining strategic directions of geographies can be announced more frequently.

A number of KIs suggested that grantee networking opportunities could have been stronger, by sharing experiences and lessons learned, and identifying channels for technical support between grantees. Linkages among the four countries have not been emphasized, and despite the disparity between the countries there are common experiences and lessons learned that could be drawn on. This is reflected in the fact that regional projects are fewer (SD3), and so training courses to enhance regional capacity were limited. This relative lack of regional perspective may be due to the RIT being entrenched in Madagascar and not having a wider presence in the hotspot. However one KI also suggested this could also be due to CEPF funding being explicitly designed to address the ecosystem profile, such that applicants prioritize their core project needs and regional activities are of secondary importance. Given the next phase of investment in the region is focussed on ecosystem based adaptation, this area for improvement is a relevant one.

## IMPACT

According to KIs and grantees, overall the CEPF projects that have closed have achieved their expected targets. With 35% of projects still ongoing at the time of writing this report (December

2021), there is agreement that these are largely on track to meet their targets, and where there are shortfalls they are justified and documented. This was perceived as being significant given the implementation challenges faced by many projects, particularly in Madagascar which has seen political instability and increased environmental threats in recent years. As one KI noted *“in the smaller islands the positive trends in biodiversity have been realized, however this is harder in Madagascar because there are such great challenges. The context is very difficult, and it has been a case of crisis management in Madagascar in the last decade, as these challenges are outside the control of the RIT and grantees”*.

The mid-term assessment highlights that despite no specific target being set in the ecosystem profile, 64 red-listed species have benefitted from species-focussed conservation action, which is considered a *“stellar achievement”*. The most recent annual portfolio overview states that tangible impacts are being observed, but that there are still opportunities to optimize further biodiversity, human wellbeing, civil society capacity and enabling conditions through active grantee support. In terms of pillars, biodiversity has the largest share of grants and budget allocated (Table 3). In terms of civil society capacity, the shortfall of SD3 grants represents a missed opportunity to create a truly regional and sustainable network of civil society in the hotspot. However, one KI perceived the CEPF programme enabled new actors to *“position themselves on the conservation market, because it was an open call with independent evaluators, this has allowed new actors to emerge with new ideas and compete with larger more traditional organizations”*.

In total, 92 grantees have received CEPF grants, and all of these organizations will have gained experience and support in designing, managing and implementing conservation projects. The mid-term assessment highlights that many grants include explicit activities related to capacity building of either the grantee or sub-grantees. At the time of the mid-term assessment, 85% of local communities targeted by site-based grants that had closed were considered to have had tangible benefits for wellbeing in the form of increased food security due to sustainable management of fisheries, increased income from nature-based tourism, or other alternative income-generating activities. In terms of enabling conditions, awarded grants were assessed as increasing public debate and awareness around deforestation, fire controls, the need for sustainable fisheries and protecting endangered species. However, tangible and lasting benefits such as awareness raising activities are very difficult to measure, especially in Madagascar where significant socio-economic challenges present competing demands for environmental resources.

The wide distribution of projects across the countries and within countries was highlighted by two KIs as presenting challenges when measuring the wider impact of the grant portfolio given the disparity in ecosystems and priorities, and that this might be strengthened by concentrating efforts in particular regions or ecosystems.

## ACCESSIBILITY

The spread of local versus international grantees in the region is impressive, with a 70% share of the grants awarded to local organizations and a near equal allocation of budget (Table 7). Local organizations received a good mix of small and large grants, whereas international organizations received mostly large grants but did still receive some small grants. KIs were in agreement that the spread of grantee type was good and that this strengthened local capacity, however it was noted that international organizations based in Madagascar (where the largest proportion of grantees were situated) are largely staffed by local Malagasy individuals and so these grants still result in enhanced capacity at the local level. This achievement is attributed to the efforts of the RIT to reach out to local organizations, particularly in Madagascar where the RIT had the strongest presence.

Table 7. Distribution of grants and budget by local or international organization (Source: MADIO - All Grants- Oct. 21.xlsx).

Type of organization	Number of grants	% of grants	Allocation of budget (USD)	% Allocation of budget	Number of large grants	Number of small grants
International	38	30%	4,654,132.29	42%	29	9
Local	89	70%	6,332,891.65	58%	37	52
<b>Total</b>	<b>127</b>		<b>10,987,023.94</b>			

## ADAPTIVE MANAGEMENT

Overall, the RIT has been commended for their ability to accept suggestions to improve processes and work in partnership with CEPF. The RIT has faced many external risks that are outside their control, with significant political instability and the unprecedented challenges presented by Covid-19 but has continued to work and achieve a large portfolio of grants that is considered to be well-balanced. In the past year the RIT has carried out 12 supervision missions to 10 large and 20 small grants (25 in Madagascar, 4 in Comoros), which is an achievement given the travel restrictions imposed by the pandemic.

One informant highlighted that the threshold for small grants was increased from \$20,000 to \$40,000 to encourage increased applications from local organizations, especially in the Seychelles and Mauritius. Staff turnover and management of internal relations were an internal barrier, but these were sufficiently dealt with without damaging relations. A number of lessons

learned were identified during the mid-term process, in particular that the development of the grant portfolio had been significantly constrained by the delay in awarding small grants, although processes to improve this have now been addressed with the timeframe for awarding of grants being reduced from over a year to three-five months. However, this was carried out late in the investment period when at least 80% of the funding had been committed, and so adaptation at the portfolio level was restricted and largely limited to the grant-level. The implications of this are yet to be seen, although whilst most respondents to the grantee survey indicated the RIT had provided support to their projects, only 44% indicated that the RIT had helped them to respond to risks or unexpected situations. As discussed, regional connections could have been strengthened by the RIT and greater presence within the countries outside Madagascar could have been achieved. Covid-19 contributed to these shortfalls, and one KI suggested that perhaps more could have been done to move support online but this was not achieved. However, the most recent annual portfolio overview commends the ability of grantees to transfer meetings and conferences to online methods which is highlighted as indicating the adaptability of grantees.

## CONCLUSION & LESSONS LEARNED

Overall, the MADIO hotspot RIT largely performed its duties well with a sizable and balanced portfolio of grants achieved during this investment period. The portfolio is felt to reflect the strategic directions and priorities of the ecosystem profile for the hotspot and the relative size and needs of each country. However, these achievements were not without challenges. Overall six clear themes emerged during this evaluation:

1. The high turnover of staff both within the RIT, TMF and CEPF significantly limited the capacity and function of the RIT during the first half of this investment period. This has significantly improved during recent years, with staff roles stabilizing and TMF responding well to observations and suggestions made by CEPF.
2. The administrative and bureaucratic processes of the RIT and TMF were slow and restricted, resulting in the slow awarding of small grants. This has also been improved, and the RIT responded well to suggestions from CEPF most recently with the consultancy to streamline administration, however the effects of this are yet to be fully realized.
3. Being embedded in the country, the RIT's understanding of the context in Madagascar was very good, reflected in the number and type of grants there. However, their presence in the hotspot outside Madagascar was weaker, and the consultancy model was not highly effective largely due to delays in recruitment and the additional administration.
4. The RIT's communication of the CEPF programme in the hotspot could have been stronger, especially in the Indian Ocean Islands. The investment period did not result in strong regional networking and collaboration as was intended. This was largely due to less demand for these types of projects from grantees, but also reflects weaknesses in the RIT's approach to encouraging this type of grantee exchange and identifying and utilizing regional opportunities.
5. Delays and blockages to progress need to be identified and acted on faster, and ideally the mid-term assessment should be carried out before the majority of funds are allocated, to allow for adaptive management at the portfolio scale. A more continuous, developmental evaluation approach might also be considered.
6. The RIT has always responded well to suggestions to improve, and relations with CEPF are good. Working with a local Malagasy organization has provided many benefits such as a good understanding of the local context, especially in Madagascar, and legacy through internal capacity building at TMF.

A number of lessons learned have been identified by this evaluation, to help with the next phase of CEPF investment in the hotspot. These include the need to strengthen the presence of the RIT beyond Madagascar to the Indian Ocean Islands, and improve communication throughout the hotspot to help foster regional networking and collaboration. One recommendation is that a stronger and more established presence in all of the countries should be in place very early on during the next investment period to avoid delays. Also, whilst staff changes are largely outside the RIT's control, delays to processes need to be identified and reported on faster to minimize the effect on the development of the portfolio. This is also true for the mid-term assessment, which ideally should be carried out before the majority of grant allocation has taken place so that

any necessary adaptation can take place at the portfolio level. Given the size of the portfolio, another recommendation is that the potential benefits of geographic priorities for investment be examined during the next ecosystem profile, for example by maximizing efficiency through more concentrated project localities. Finally, having a local organization embedded in Madagascar has provided many benefits, including strengthening relationships between CEPF and TMF, the depth of understanding of the local context in Madagascar in particular, as well as improving the capacity of this local organization, which is a significant aim of CEPF.

# ANNEXES

## ANNEX 1. KEY DOCUMENTS

ID	Document Name	Document Description
<b>MADIO ECOSYSTEM PROFILE</b>		
1	MADIO Biodiversity Hotspot Ecosystem Profile(English).pdf	
2	MADIO Biodiversity Hotspot Ecosystem Profile(French).pdf	
3	MADIO Ecosystem Profile - Annex 6 KBAs.pdf	
4	MADIO Ecosystem Profile - Annex 7a Trigger Species.pdf	
5	MADIO Ecosystem Profile - Annex 7b Trigger Species.pdf	
6	Program EBAIO inception report_23Sep21.pdf (English) EBAIO fiche descriptive (French)	Context documents for the new investment phase focussed on Ecosystem Services and Climate Change Adaptation.
<b>RIT PROPOSAL</b>		
7	DC34_MIOI_RIT_ProcurementSummaryAssessment.pdf	Summary of MADIO RIT procurement process in 2014, including strengths and weakness of each proposal
8	DC34_NoObjection_MadagascarRIT.pdf	Submission to CEPF donor council to approve TMF as MADIO RIT in December 2014
9	65702 - Fondation Tany Meva Final Full Proposal.pdf	TMF final full RIT proposal
10	RIT MIO Agreement CS.PDF	Formal agreement between RIT and CEPF.
11	MADIO - 65702 Fondation Tany Meva - RIT Amendment #1.pdf	First amendment to proposal
12	MADIO - 65702 Fondation Tany Meva - RIT Amendment #2.pdf	Second amendment to proposal
<b>RIT BUDGET</b>		
13	Budget_Tany_Meva_vs120215_1_ (1).xls	Tany Meva five year budget (2015-2020?)
14	65702 Budget_V310821 (2).xls	Tany Meva summary budget 2021

15	MADIO - 65702 Fondation Tany Meva - Amendment 1 Final Budget Template.xls	Tany Meva budget 2020-2022
<b>RIT PROGRESS REPORTS &amp; MID-TERM ASSESSMENT</b>		
16	MADIO Mid-term Assessment 2019-2020.pdf	
17	MADIO RIT - Tany Meva - Progress Report 2.1.2015-6.30.2015.pdf	
18	MADIO RIT - Tany Meva - Progress Report 7.1.2015-12.31.2015.pdf	
19	MADIO RIT - Tany Meva - Progress Report 1.1.2016-6.30.2016.pdf	
20	MADIO RIT - Tany Meva - Progress Report 7.1.2016-12.31.2016.pdf	
21	MADIO RIT - Tany Meva - Progress Report 1.1.2017-6.30.2017.pdf	
22	MADIO RIT - Tany Meva - Progress Report 7.1.2017-12.31.2017.pdf	
23	MADIO RIT - Tany Meva - Progress Report 1.1.2018-6.30.2018.pdf	
24	MADIO RIT - Tany Meva - Progress Report 7.1.2018-12.31.2018.pdf	
25	MADIO RIT - Tany Meva - Progress Report 1.1.2019-6.30.2019.pdf	
26	MADIO RIT - Tany Meva - Progress Report 7.1.2019-12.31.2019.pdf	
27	MADIO RIT - Tany Meva - Progress Report 1.1.2020-6.30.2020.pdf	
28	MADIO RIT - Tany Meva - Progress Report 7.1.2020-12.31.2020.pdf	
29	MADIO RIT - Tany Meva - Progress Report 1.1.2021-6.30.2021.pdf	
<b>SUPERVISION MISSIONS</b>		
30	6-RIT MADIO Supervision Mission Report - Sept 2017 final.pdf	



31	7-RIT MADIO Supervision Mission Report - Jan 2018.pdf	
32	8 RIT-MADIO_Mission de supervision_Report (June 2018).pdf	
33	RIT MADIO Supervision Mission 1 Outreach Comoros March 2015.pdf	
34	RIT MADIO Supervision Mission 2 Maurice (outreach) July 2015.pdf	
35	RIT MADIO Supervision Mission 3 - February 2016.pdf	
36	RIT MADIO Supervision Mission 4 - July 2016.pdf	
37	RIT MADIO Supervision Mission 5 - Feb 2017.pdf	
<b>ANNUAL PORTFOLIO OVERVIEWS</b>		
38	MADIO Annual Portfolio Overview 2015.pdf	
39	MADIO Annual Portfolio Overview 2016.pdf	
40	MADIO Annual Portfolio Overview 2017.pdf	
41	MADIO Annual Portfolio Overview 2018.pdf	
42	MADIO Annual Portfolio Overview 2020.pdf	
43	MADIO Annual Portfolio Overview 2021.pdf	
<b>MADIO GRANT INFORMATION</b>		
44	MADIO - All Grants- Oct. 21.xlsx	Spreadsheet of all CEPF-funded projects in the region 2015-2022.
45	MADIO grants with SDs.xlsx	Spreadsheet of all CEPF-funded projects in the region 2015-2022 and the Strategic Directions they address.
46	Post-project survey raw data.xls	Post-project grantee online survey data
<b>RIT STRUCTURE</b>		
47	Organizational Charte_Fondation Tany Meva_nov20.pdf	TMF organizational chart
48	Responsible RIT - Janvier 2021-RFM.xls	Shows which member of the 4 programme team - Rivo, Josue, Rindra and the leader Monique - is responsible for which grants.

<b>CEPF OPERATIONAL DOCUMENTS</b>		
49	cepf-monitoring-framework.pdf	CEPF's monitoring framework, extracted from CEPF Operational Manual section OM 3.5 Monitoring Framework
50	cepf_impact_report_2020.pdf	Most recent CEPF impact report

## ANNEX 2. EVALUATION MATRIX

Evaluation criteria questions	Indicators	Sources	Methodology
<b>Relevance: Were the activities undertaken relevant to the ecosystem profile, RIT terms of reference, the geography of the hotspot, the capacity of civil society there, and the global monitoring framework of CEPF?</b>			
To what extent were the activities undertaken by the RIT relevant to the MADIO ecosystem profile?	<p>Number and type of grantee in each country</p> <p>Number and type of project in each country</p> <p>Decision making and prioritization of awarding grants</p> <p>Sufficiency of alignment of RIT activities and grant awarding with ecosystem profile</p>	<p>Key documents, in particular: Ecosystem profile, MADIO grant information, semi-annual performance reports, mid-term assessment</p> <p>Key informants</p>	Desk review, key informant interviews
To what extent were the activities undertaken by the RIT relevant to the RIT Terms of Reference?	<p>Sufficiency of alignment of RIT activities with the nine components and 52 duties outlined in the RIT ToR</p> <p>Ability of the RIT to achieve the nine components and 52 duties outlined in the ToR</p> <p>Sufficiency of RIT monitoring against logical framework</p>	<p>Key documents, in particular: RIT grant agreements, RIT proposal, MADIO grant information, semi-annual performance reports, mid-term assessment</p> <p>Key informants</p>	Desk review, key informant interviews
To what extent were the activities undertaken by the RIT relevant to the geography of the hotspot?	<p>Sufficiency of alignment of grant coverage with the geographic priorities in each of the four countries, and the hotspot as a whole</p> <p>Quality of RIT coordination in each</p>	<p>Key documents, in particular: Ecosystem profile, MADIO grant information, semi-annual performance reports, mid-term assessment</p> <p>Key informants</p>	Desk review, key informant interviews

	country, and any differences between countries		
To what extent were the activities undertaken by the RIT relevant to the capacity of civil society there?	Sufficiency of RIT support to civil society in each country, and the hotspot as a whole	Key documents, in particular: Ecosystem profile, MADIO grant information, semi-annual performance reports, mid-term assessment  Key informants	Desk review, key informant interviews
To what extent were the activities undertaken by the RIT relevant to the global monitoring framework of CEPF?	Sufficiency of alignment of RIT activities and grants with CEPF global monitoring framework	Key documents, in particular: CEPF monitoring framework, MADIO grant information, semi-annual performance reports, mid-term assessment  Key informants	Desk review, key informant interviews
<b>Efficiency: How efficiently was the budget allocated to the RIT converted into results?</b>			
To what extent were the RIT activities achieved according to the proposed budget?	Extent RIT activities were performed within budget  Suitability of the budget for the activities  Suitability of timeline for the activities	Key documents, in particular: RIT grant agreements, RIT proposal, RIT budgets  Key informants	Desk review, key informant interviews
Did the RIT provide good value for money?	Identification of any significant variation in expenditures and reasons for them  Extent of completion of activities within timeframe	Key documents, in particular: RIT budgets, semi-annual performance reports, mid-term assessment, supervision missions, annual portfolio overviews  Key informants	Desk review, key informant interviews
<b>Effectiveness: What were the strengths and weaknesses of the RIT structure and capacities regarding effective delivery of results?</b>			
How appropriate was the RIT structure to achieve impact?	Division of roles and responsibilities within RIT  Division of RIT duties	Key documents, in particular: RIT structure, semi-annual performance reports, mid-term assessment, annual	Desk review, key informant interviews

	<p>within each country in the hotspot</p> <p>Quality of communication and support within RIT and between host organization</p> <p>Quality of coordination of CEPF investment in the hotspot</p>	<p>portfolio overviews, supervision missions</p> <p>Key informants</p>	
<p>How appropriate was the capacity of the RIT to achieve impact?</p>	<p>Quality of communication of CEPF investment in the hotspot</p> <p>Quality of RIT administration and monitoring of grantees</p> <p>Quality of RIT support to grantees</p> <p>Quality of communication of RIT between CEPF, grantees and other stakeholders</p>	<p>Key documents, in particular: RIT structure, semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>
<p>What were the overall strengths and weaknesses of the RIT?</p>	<p>Identification of key strengths and weakness of RIT</p>	<p>Key documents, in particular: RIT structure, semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>
<p><b>Coverage: To what extent does the portfolio of grants awarded to date cover the strategic directions and investment priorities set out in the investment strategy for the hotspot?</b></p>			
<p>What is the scope and coverage of grants awarded to date?</p>	<p>Number of small and large grants awarded to date</p> <p>Coverage of small and large grants in each of the four countries in the</p>	<p>Key documents, in particular: MADIO grant information</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>

	<p>hotspot</p> <p>Coverage of pillars, category, habitat and taxon by all grants, and in each country</p>		
<p>To what extent does the coverage of grants align with the strategic directions and investment priorities</p>	<p>To what extent does the coverage of grants align with the four strategic directions in the hotspot and each country?</p> <p>To what extent does the coverage of grants align with the ten investment priorities in the hotspot and each country?</p>	<p>Key documents, in particular: MADIO hotspot ecosystem profile, MADIO grant information, semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>
<p><b>Impact: To what extent have the targets set in the hotspot ecosystem profile for impacts on biodiversity conservation, human wellbeing, civil society capacity and enabling conditions been met?</b></p>			
<p>To what extent have the targets set in the hotspot ecosystem profile for impacts on biodiversity conservation been met?</p>	<p>Quality of biodiversity conservation achievements in each country, and the hotspot as a whole</p> <p>Extent to which targets for biodiversity conservation in each country were met, and in the hotspot as a whole</p>	<p>Key documents, in particular: MADIO hotspot mid-term assessment, Annual portfolio overviews, ecosystem hotspot</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>
<p>To what extent have the targets set in the hotspot ecosystem profile for impacts on human wellbeing been met?</p>	<p>Quality of human wellbeing achievements in each country, and the hotspot as a whole</p> <p>Extent to which targets for human wellbeing in each country were met, and in the hotspot as</p>	<p>Key documents, in particular: MADIO hotspot mid-term assessment, Annual portfolio overviews, ecosystem hotspot</p> <p>Key informants</p>	<p>Desk review, key informant interviews</p>

	a whole		
To what extent have the targets set in the hotspot ecosystem profile for impacts on civil society capacity been met?	<p>Quality of improvements to civil society capacity in each country, and the hotspot as a whole</p> <p>Extent to which targets for civil society capacity in each country were met, and in the hotspot as a whole</p>	<p>Key documents, in particular: MADIO hotspot mid-term assessment, Annual portfolio overviews, ecosystem hotspot</p> <p>Key informants</p>	Desk review, key informant interviews
To what extent have the targets set in the hotspot ecosystem profile for impacts on enabling conditions been met?	<p>Quality of improvements to enabling conditions in each country, and the hotspot as a whole</p> <p>Extent to which targets for enabling conditions in each country were met, and in the hotspot as a whole</p>	<p>Key documents, in particular: MADIO hotspot mid-term assessment, Annual portfolio overviews, ecosystem hotspot</p> <p>Key informants</p>	Desk review, key informant interviews
<p><b>Accessibility: Does the grant portfolio involve an appropriate balance of international and local grantees, considering the relative strengths of different organizations regarding delivery of the investment strategy and considering the priority given by CEPF to building the capacity of local civil society?</b></p>			
To what extent does the grant portfolio represent a balance of local and international grantees in the hotspot?	<p>Ratio of local versus international grantees in the grant portfolio</p> <p>Ratio of local versus international organizations that unsuccessfully applied for grants</p> <p>Publicity of grant availability within hotspot</p> <p>Quality of engagement with local and international grantees</p>	<p>Key documents, in particular: MADIO grant information, semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions</p> <p>Key informants</p>	Desk review, key informant interviews

	Decision making and prioritization of awarding grants		
<b>Adaptive Management: In what ways has the development of the grant portfolio been constrained by risks (political/institutional/security/health) or taken advantage of unanticipated opportunities?</b>			
To what extent has the development of the grant portfolio been constrained by risks?	Sufficiency of RIT monitoring and reporting processes  Ability of RIT to identify and manage risks	Key documents, in particular: semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions  Key informants	Desk review, key informant interviews
To what extent has the grant portfolio taken advantage of unanticipated opportunities?	Extent to which the RIT budgeted for unexpected activities  Ability of RIT to adapt to unexpected activities in a timely manner	Key documents, in particular: semi-annual performance reports, mid-term assessment, annual portfolio overviews, supervision missions  Key informants	Desk review, key informant interviews



**ANNEX 3. TERMS OF REFERENCE FOR THIS EVALUATION**

## Call for Proposals

### Evaluation of Lessons Learned to Inform Reinvestment in the Madagascar and Indian Ocean Islands Biodiversity Hotspot

<b>Opening Date:</b>	18 August 2021
<b>Closing Date:</b>	10 September 2021, 24:00 hours (U.S. EST)
<b>Questions Due Date:</b>	1 September 2021 (Questions should be sent to <a href="mailto:cepf@cepf.net">cepf@cepf.net</a> ).
<b>Submission:</b>	Proposals should be sent to <a href="mailto:cepf@cepf.net">cepf@cepf.net</a> by the closing date.
<b>Location:</b>	CEPF, 2011 Crystal Drive, Suite 600, Arlington, VA 22202, USA

## 1. INVITATION

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement, Conservation International (CI), the European Union, the Global Environment Facility (GEF), the Government of Japan and the World Bank. CEPF is a global program that provides grants to civil society to safeguard the world's biodiversity hotspots. As one of the founding partners, CI administers the global program through a CEPF Secretariat. CEPF's purpose is to strengthen the involvement and effectiveness of civil society in the conservation and management of globally important biodiversity.

The CEPF Secretariat intends to conduct an evaluation of the regional implementation team (RIT) of the Madagascar and Indian Ocean Islands Biodiversity Hotspot to inform reinvestment. The RIT provides strategic leadership for the program, which is implemented in four countries: Comoros, Madagascar, Mauritius and Seychelles. Interested consultants or firms should submit a proposal by the closing date listed above.

The successful consultant/firm shall be required to adhere to CI's code of ethics, statement of work, and the terms and conditions of the contract. This call for proposals does not obligate CI to execute a contract nor does it commit CI to pay any costs incurred in the preparation and submission of the proposals. Furthermore, CI reserves the right to reject any and all offers if such action is considered to be in the best interest of CI.

## 2. BACKGROUND AND OBJECTIVE

In each of the biodiversity hotspots where it invests, CEPF selects a RIT to provide strategic leadership for the program. Each RIT consists of one or more civil society organizations active in conservation in the hotspot. The objective of the RIT is to convert the plans in the ecosystem profile into a cohesive portfolio of grants that achieves the objectives outlined in the logical framework.

Given that CEPF intends to re-invest in selected hotspots, CEPF will commission an independent evaluation of incumbent RITs toward the end of the investment phase. This will comprise a review of the performance of the incumbent RIT and challenges, opportunities and lessons learned associated with the RIT role.

In combination with the final assessment of the results of the hotspot investment (conducted as a separate exercise), this evaluation will enable future applicants for the RIT role to be better informed about the experience of the incumbent RIT and the results achieved, and create a more competitive environment for all applicants.

## 3. PROPOSAL SUBMISSION INSTRUCTIONS

Proposals shall be submitted in one volume, in English, and consist of:

- Technical Proposal
- Financial Proposal

### Technical Proposal

Should comprise of the following parts:

- **Technical approach, methodology and detailed work plan.**  
This part shall be between three to five pages long but may not exceed five pages. Single spacing and 12-point font is recommended.

The technical proposal should describe in detail how the offeror intends to carry out the requirement described in the scope of work below. The technical proposal should demonstrate a clear understanding of the work to be undertaken and the responsibilities of all parties involved.

- **Management, key personnel and staffing plan.**  
This part shall be between two and five pages long but may not exceed five pages. Single spacing and 12 pt font recommended. CVs for key personnel may be included in an annex to the technical proposal and will not count against the page limit.

Must have:

- Experience in relevant technical areas, e.g., monitoring and evaluation (at least five years).
  - Master's degree in relevant natural resources-related field, e.g., monitoring and evaluation, with three years of experience, or bachelor's degree with five years of experience.
  - Experience working with CEPF programs, or equivalent.
  - Fluency in English and French.
- **Corporate capabilities, experience, past performance and references.**  
This part shall be between two and four pages long but may not exceed four pages.

#### Financial Proposal

A detailed budget in USD. The budget shall include a budget narrative that explains the basis for the estimation of expenses. If required, supporting information must be provided in sufficient detail to allow for a complete analysis of the cost.

## **4. PROCESS AND BASIS FOR AWARD**

The evaluation of the RIT will be undertaken by an independent consultant, selected through a competitive procurement process. Selection of consultants will be overseen by the Monitoring, Evaluation and Outreach Unit within the CEPF Secretariat. The award will be made to the consultant whose proposal is determined to be responsive to this call for proposals, meets the technical requirement, and is determined to represent the most advantage to CI.

Evaluation Criteria:

- |   |    |
|---|----|
| - Technical Approach, Methodology and Work Plan                       | 40 |
| - Personnel Qualification   | 30 |
| - Past Performance – reference of similar work previously implemented | 20 |
| - Lowest Cost   | 10 |

## **Scope of Work, Deliverables and Deliverables Schedule**

### **Evaluation of Lessons Learned to Inform Reinvestment in the Madagascar and Indian Ocean Islands Biodiversity Hotspot**

#### **1) Background**

The Critical Ecosystem Partnership Fund (CEPF) is a joint initiative of l'Agence Française de Développement, Conservation International, the European Union, the Global Environment Facility, the Government of Japan and the World Bank designed to help safeguard the world's biodiversity hotspots. As one of the founding partners, Conservation International administers the global program through the CEPF Secretariat.

In each of the biodiversity hotspots where it invests, CEPF selects a regional implementation team (RIT) to provide strategic leadership for the program. Each RIT consists of one or more civil society organizations active in conservation in the hotspot. The objective of the RIT is to convert the plans in the ecosystem profile into a cohesive portfolio of grants that contributes to CEPF's long-term goals for the hotspot.

In the Madagascar and Indian Ocean Islands Biodiversity Hotspot, the role of the RIT is performed by the Tany Meva Foundation located in Antananarivo, Madagascar. CEPF investment in this hotspot totals US\$12.27 million for a program taking place from January 2015 through June 2022. The investment includes the following countries: Comoros, Madagascar, Mauritius and Seychelles.

Prior to reinvestment in this hotspot, a process to select the RIT for the next phase of investment will be initiated. This process will be informed by an evaluation of lessons learned in relation to the incumbent RIT for the hotspot. This evaluation will consider the performance of the incumbent RIT in relation to the geography of the hotspot, the capacity of civil society there, the budget allocated to the RIT, and its achievement of individual deliverables as defined in its grant agreement with CEPF. It is entirely distinct and separate from the formal "final assessment" of the portfolio, which is undertaken at the end of an investment phase to evaluate the overall impacts of CEPF investment in a hotspot.

#### **2) Objective of the Evaluation**

The objective of the evaluation is to inform investment decisions for the next phase of

CEPF investment in the Madagascar and Indian Ocean Islands Biodiversity Hotspot in the following ways. First, the evaluation will inform decision-making by the CEPF donors regarding selection of a RIT for the next phase of investment by evaluating the performance of the incumbent RIT and reviewing the institutional landscape for potential competitors.

Second, the evaluation will enable the design of RIT proposals that incorporate lessons learned regarding the programmatic and management approaches adopted by the incumbent RIT.

Third, the evaluation will inform the preparation of a new ecosystem profile for the hotspot, by documenting challenges and opportunities encountered by the RIT while implementing a grants program to engage and strengthen civil society in conserving globally important biodiversity in the social, political and institutional context of the hotspot.

### **3) Criteria for Evaluation**

The evaluation will look closely at the components and functions of the Madagascar and Indian Ocean Islands RIT, as set out in the terms of reference, and evaluate the performance of the RIT against the following criteria:

- i) Relevance**  
Were the activities undertaken relevant to the ecosystem profile, RIT terms of reference, the geography of the hotspot, the capacity of civil society there, and the global monitoring framework of CEPF?
- ii) Efficiency**  
How efficiently was the budget allocated to the RIT converted into results?
- iii) Effectiveness**  
What were the strengths and weakness of the RIT structure and capacities regarding effective delivery of results?

In addition to directly evaluating the performance of the RIT, lessons learned from the CEPF grants portfolio regarding the RIT role will be compiled and reviewed in the context of the following themes:

- iv) Coverage**  
To what extent does the portfolio of grants awarded to date cover the strategic directions and investment priorities set out in the investment strategy for the

hotspot?

**v) Impact**

To what extent have the targets set in the hotspot ecosystem profile for impacts on biodiversity conservation, human wellbeing, civil society capacity and enabling conditions been met?

**vi) Accessibility**

Does the grant portfolio involve an appropriate balance of international and local grantees, considering the relative strengths of different organizations regarding delivery of the investment strategy and considering the priority given by CEPF to building the capacity of local civil society?

**vii) Adaptive management**

In what ways has the development of the grant portfolio been constrained by risks (political/institutional/security/health) or taken advantage of unanticipated opportunities?

## **4) Formally Agreed Duties of the Regional Implementation Teams**

The terms of reference of the Madagascar and Indian Ocean Islands RIT consist of nine components, which are:

1. Coordinate CEPF investment in the hotspot.
  - 1.1. Serve as the field-based technical representative for CEPF in relation to civil society groups, grantees, international donors, host country governments and agencies, and other potential partners within the hotspot.
  - 1.2. Ensure coordination and collaboration with CEPF's donors, in coordination with the CEPF Secretariat and as appropriate in the hotspot.
  - 1.3. Promote collaboration and coordination, and opportunities to leverage CEPF funds with local and international donors and governments investing in the region, via donor roundtables, experiential opportunities or other activities.
  - 1.4. Engage conservation and development stakeholders to ensure collaboration and coordination.
  - 1.5. Attend relevant conferences/events in the hotspot to promote synergy and coordination with other initiatives. • Build partnerships/networks among grantees in order to achieve the objectives of the ecosystem profile.

2. Support the mainstreaming of biodiversity into public policies and private sector business practices.
  - 2.1. Support civil society to engage with government and the private sector and share their results, recommendations, and best practice models. Build institutional capacity of grantees to ensure efficient and effective project implementation.
  - 2.2. Engage directly with private sector partners and government officials and ensure their participation in implementation of key strategies.
3. Communicate the CEPF investment throughout the hotspot.
  - 3.1. Communicate regularly with CEPF and partners about the portfolio through face-to-face meetings, phone calls, the internet (website and electronic newsletter) and reports to forums and structures.
  - 3.2. Prepare a range of communications products to ensure that ecosystem profiles are accessible to grant applicants and other stakeholders.
  - 3.3. Disseminate results via multiple and appropriate media.
  - 3.4. Provide lessons learned and other information to the Secretariat to be communicated via the CEPF website.
  - 3.5. Conduct exchange visits with other RITs to share lessons learnt and best practices.
  - 3.6. In coordination with the CEPF Secretariat, ensure communication with local representatives of CEPF's donors. Establish and coordinate a process for solicitation of applications.
4. Build the capacity of local civil society.
  - 4.1. Undertake a capacity needs assessment for local civil society.
  - 4.2. Support implementation of a long-term strategic vision for the hotspot geared toward enabling civil society to "graduate" from CEPF support.
  - 4.3. Assist civil society groups in designing projects that contribute to the achievement of objectives specified in the ecosystem profile and a coherent portfolio of mutually supportive grants.
  - 4.4. Build institutional capacity of grantees to ensure efficient and effective project implementation.
  - 4.5. Build capacity of civil society to engage with and influence government agencies.
  - 4.6. Build capacity of civil society to engage with and influence the private sector.



5. Establish and coordinate a process for large grant proposal solicitation and review.
  - 5.1. Establish and coordinate a process for solicitation of applications.
  - 5.2. Announce the availability of CEPF grants.
  - 5.3. Publicize the contents of the ecosystem profile and information about the application process.
  - 5.4. With the CEPF Secretariat, establish schedules for the consideration of proposals at pre-determined intervals, including decision dates.
  - 5.5. Establish and coordinate a process for evaluation of applications.
  - 5.6. Evaluate all letters of inquiry.
  - 5.7. Facilitate technical review of applications (including, where appropriate, convening a panel of experts).
  - 5.8. Obtain external reviews of all applications over US\$250,000.
  - 5.9. Decide jointly with the CEPF Secretariat on the award of all grant applications.
  - 5.10. Communicate with applicants throughout the application process to ensure applicants are informed and fully understand the process.
6. Manage a program of small grants of US\$20,000 (US\$50,000 or less in select approved regions).
  - 6.1. Establish and coordinate a process for solicitation of small grant applications. • Announce the availability of CEPF small grants.
  - 6.2. Conduct due diligence to ensure sub-grantee applicant eligibility and capacity to comply with CEPF funding terms.
  - 6.3. Convene a panel of experts to evaluate proposals.
  - 6.4. Decide on the award of all grant applications of US\$20,000 or less (US\$50,000 or less in select approved regions).
  - 6.5. Manage the contracting of these awards. • Manage disbursement of funds to grantees. • Ensure small grant compliance with CEPF funding terms. • Monitor, track, and document small grant technical and financial performance. • Assist the Secretariat in maintaining the accuracy of the CEPF grants management database. • Open a dedicated bank account in which the funding allocated by CEPF for small grants will be deposited, and report on the status of the account throughout the project. • Ensure that grantees complete regular (based on length of the project) technical and financial progress reports. • Prepare semi-annual summary report to the CEPF Secretariat with detailed information of the

small grants program, including names and contact information for all grantees, grant title or summary of grant, time period of grants, award amounts, disbursed amounts, and disbursement schedules.

7. Monitor and evaluate the impact of CEPF's large and small grants.
  - 7.1. Collect and report on data for portfolio-level indicators (from large and small grantees) annually as these relate to the logical framework in the ecosystem profile.
  - 7.2. Collect and report on relevant data in relation to CEPF graduation criteria for the hotspot.
  - 7.3. Collect and report on relevant data for CEPF's global monitoring indicators.
  - 7.4. Ensure quality of performance data submitted by large and small grantees.
  - 7.5. Verify completion of products, deliverables, and short-term impacts by grantees, as described in their proposals.
  - 7.6. Support grantees to comply with requirements for completion of tracking tools, including the Management Effectiveness Tracking Tool.
  - 7.7. In coordination with CEPF Secretariat, conduct a mid-term assessment and a final assessment of portfolio progress (covering large and small grants). • Conduct regular site visits to large and small grantees to monitor their progress and ensure outreach, verify compliance and support capacity building.
  - 7.8. Provide guidance to grantees for the effective design and implementation of safeguard policies to ensure that these activities comply with the guidelines detailed in the CEPF Operations Manual and with the World Bank's environmental and social safeguard policies. Provide additional support and guidance during the implementation and evaluation cycles at regular field visits to projects.
  - 7.9. In coordination with CEPF Secretariat, conduct a final assessment of portfolio progress and assist with preparation of report documentation.
8. Lead the process to develop, over a three-month period, a long-term strategic vision for CEPF investment.
  - 8.1. Mobilize expertise and establish an advisory group to ensure that the long-term vision engages with appropriate stakeholders.
  - 8.2. Undertake a review of relevant literature to ensure alignment of the long-term vision with other initiatives and avoid duplication of effort.
  - 8.3. Consult with key stakeholders to solicit their input into the development of the long-term vision. • Synthesize the results of the literature review and stakeholder consultations into a long-term strategic vision document.

8.4. Present the draft long-term vision to key stakeholders and revise the document according to their comments.

8.5. Prepare a progress report for presentation to the CEPF donors' working group.

#### 9. Reporting

9.1. Participate in initial week of RIT training.

9.2. Participate in two "supervision missions" per year; each to include at least two days in the office and a visit to grantees in the field (approximately two weeks).

9.3. Prepare quarterly financial reports and six-monthly technical reports.

9.4. Respond to CEPF Secretariat requests for information, travel, hosting of donors and attendance at a range of events to promote CEPF.

## 5) Duties

A consultancy firm (hereafter "the consultant") is required to undertake an evaluation of lessons learned to inform reinvestment in the Madagascar and Indian Ocean Islands Biodiversity Hotspot, in the context of the abovementioned objective (Section 2). The consultant is required to form a team with experience evaluating biodiversity conservation programs and with adequate knowledge of the four countries covered by the RIT.

The evaluation will consider the performance of the RIT in relation to the geography of the hotspot, the capacity of civil society there, the budget allocated to the RIT, and their achievement of individual deliverables as defined in their grant agreement with CEPF. It will also consider the impacts of the investment to date (in terms of biodiversity, human wellbeing, civil society capacity and enabling conditions for conservation), based on the findings of the mid-term assessment for the hotspot and annual portfolio overviews.

Finally, the consultant will review the institutional landscape in each of the four countries and identify potential candidate organizations that could perform the RIT role (either alone or as part of a consortium). The consultant will prepare a list of potential candidate organizations with information to include a brief description of the organization, their grant-making experience, their experience managing a project similar to that of the RIT and the pros and cons associated with their assuming the role of RIT as lead or consortium member.

The evaluation will begin with a desk review based on the following documentation:

- The ecosystem profile for the hotspot
- The final proposals for the RIT grants
- The RIT grant agreements plus any amendments
- Semi-annual performance reports prepared by the RIT
- Semi-annual supervision mission reports prepared by the CEPF Secretariat
- Annual portfolio overviews prepared by the CEPF Secretariat
- Mid-term assessment report prepared by the CEPF Secretariat
- Summary data on the grant portfolio in the hotspot, exported from CEPF's grant management system

The desk review will be complemented by interviews with relevant CEPF Secretariat staff, relevant RIT staff, staff of the host organization, a selection of CEPF grantees and applicants, and other relevant stakeholders (e.g., representatives of other donors, government agencies, etc.). The consultancy will be conducted virtually due to the pandemic. The consultant will be expected to organize all necessary meetings with stakeholders.

## **6) Deliverables**

There will be two deliverables from the consultancy. The consultant will be responsible for preparing a report on lessons learned regarding the RIT role, suitable for inclusion in the future ecosystem profile. The consultant will also be responsible for preparing a confidential report on the programmatic and financial performance of the RIT as well as the identification of potential candidate organizations suitable to play the role of the RIT for the next phase of CEPF investment in the hotspot. The chapters in this confidential report will not be included in the ecosystem profile. These two documents will inform investment decisions by CEPF and its donors, particularly regarding selection of the RIT for the reinvestment phase in the Madagascar and Indian Ocean Islands Biodiversity Hotspot. Both documents must be in English.

## **7) Timeframe**

The evaluation will be conducted between 1 October 2021, and 15 December 2021. Draft deliverables will be prepared no later than 30 November 2021, and submitted to the CEPF Secretariat for review. Final deliverables, incorporating comments from the CEPF Secretariat, will be completed by 15 December 2021.

The consultant shall also provide the CEPF Secretariat with periodic verbal briefings and meet with Secretariat staff, as requested.

The total amount of time for the assignment is 20 days and should include: allocations for literature review and interviews with CEPF Secretariat staff, RIT staff and grantees; preparation of the draft deliverables; a briefing for the CEPF Secretariat on the findings; and finalization of deliverables following incorporation of Secretariat comments.

## **8) Reporting**

The consultant will work under the close supervision and direction of the senior director for monitoring, evaluation and outreach, or such other individual that the CEPF Secretariat may designate.

## **ANNEX 4. ONLINE GRANTEE SURVEY (English version)**

# CEPF GRANTEE QUESTIONNAIRE: EVALUATION OF LESSONS LEARNED TO INFORM REINVESTMENT IN THE MADIO HOTSPOT

The Critical Ecosystem Partnership Fund (CEPF) is currently carrying out an independent evaluation of the performance of the Regional Implementation Team (RIT) in the Madagascar and Indian Ocean Islands hotspot - The Tany Meva Foundation. The purpose of this evaluation is to identify lessons learned to inform CEPF reinvestment in the hotspot.

This survey is designed for the recipient of the CEPF grants in the MADIO hotspot. The survey should take about 20 minutes. All answers will remain anonymous.

1. What is your organization's name?

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2. What is your position in your organization?

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3. Where is your organization based?

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4. What type of CEPF grant did you receive?

*Mark only one oval.*

Small grant

Large grant

Both

5. What year(s) were you awarded the grant(s)?

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6. Which country in the MADIO hotspot was your CEPF-funded project(s)?

*Mark only one oval.*

Madagascar

Seychelles

Mauritius

Comoros

About CEPF - Critical Ecosystems Partnership Fund



7. On a scale to 1 to 5, how well do you know about CEPF (objectives - mission- organization) in the Madagascar and the Indian Ocean Islands Biodiversity (MADIO) hotspot?

*Mark only one oval.*

	1	2	3	4	5	
No knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Know CEPF well

8. How did you hear about the CEPF grants?

*Mark only one oval.*

- Tany Meva Foundation
- CEPF
- Internet Search Engine
- Other: \_\_\_\_\_

9. On a scale from 1 to 5, how easy is the CEPF grant application process?

*Mark only one oval.*

	1	2	3	4	5	
Not at all easy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very easy

10. On a scale 1 to 5, how satisfied were you with the response time of the CEPF grants?

*Mark only one oval.*

	1	2	3	4	5	
Not at all satisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very satisfied

11. Please use this space if you have any comment on the application process

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### Section 3. About the Regional Implementation Team - Tany Meva Foundation

12. What kind of support do you get from the Tany Meva Foundation? (Tick all that apply)

*Tick all that apply.*

- Sites visits
- Technical assistance in project design
- Technical assistance in project implementation
- Technical assistance in project monitoring and reporting
- Training (workshops, seminars, webinars, etc..)

Other:  \_\_\_\_\_

13. What channel of communication were you using with Tany Meva Foundation? (Tick all that apply)

*Tick all that apply.*

- Email
- Phone
- Online video
- In person
- Site visits

Other:  \_\_\_\_\_

14. How often do you communicate with Tany Meva Foundation

*Mark only one oval.*

- Weekly
- Bi-weekly
- Monthly
- Quarterly
- No set frequency / when the need arises

15. Was it clear who you should approach with questions or problems and how to contact them at Tany Meva Foundation?

*Mark only one oval.*

- Yes
- No

16. On a scale 1 to 5, how satisfied were you with the frequency, responsiveness and channel of communication with Tany Meva Foundation?

*Mark only one oval.*

	1	2	3	4	5	
Not at all satisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very satisfied

17. Did Tany Meva Foundation help you to connect with other CEPF grantees in the hotspot?

*Mark only one oval.*

- Yes  
 No

18. Did Tany Meva Foundation help you to connect with other stakeholders in the hotspot? e.g. government/private sector/other donors/CSOs etc.

*Mark only one oval.*

- Yes  
 No

19. Did Tany Meva Foundation explain to you the strategic directions in the ecosystem profile?

*Mark only one oval.*

Yes

No

20. Did Tany Meva Foundation help you address risks or unexpected situations?

*Mark only one oval.*

Yes

No

21. If possible, provide an example that best illustrates Tany Meva Foundations's assistance with risk or unexpected situations

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22. Did you attend any workshops conducted by Tany Meva Foundation?

*Mark only one oval.*

Yes

No

23. Please use this space if you have any comment on communications or suggestions on how it could be improved

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24. Did Tany Meva Foundation help you with monitoring and reporting?

*Mark only one oval.*

Yes

No

25. What percentage of your organisation's staff time was spent on reporting?

*Mark only one oval.*

0-25%

25-50%

50-75%

75-100%

26. What percentage of your organisation's staff time was spent on implementation?

*Mark only one oval.*

0-25%

25-50%

50-75%

75-100%

27. Please use this space if you have any comment on monitoring and reporting or suggestions on how it could be improved

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28. Did Tany Meva Foundation visit your organization/project?

*Mark only one oval.*

Yes

No

29. If yes, how often and was this useful?

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30. What was most positive about your experience with Tany Meva Foundation as the CEPF Regional Implementation Team for this hotspot?

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31. What was most negative about your experience with Tany Meva Foundation as the CEPF Regional Implementation Team for this hotspot?

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32. Do you have any recommendation for how the Regional Implementation Team could improve its work?

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Closing questions

33. Would your organization be interested in the RIT role for CEPF in the MADIO hotspot if it were to become available?

*Mark only one oval.*

Yes

No

Maybe

34. What other donors have you received funding from for projects in the MADIO hotspot? (List)

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35. Do you have any further comments regarding CEPF and/or Tany Meva Foundation you would like to share? All answers will remain anonymous

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36. Would you be happy to follow up this survey with an online call to talk about this in a little more detail?

*Mark only one oval.*

Yes

No

37. If yes, please provide a contact email or telephone

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**Thank you!**

The survey is now complete, thank you for your time and assistance with this research.

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## ANNEX 5. KEY INFORMANTS CONSULTED

ID	Name	Organization	Position
<b>CEPF</b>			
1	Monique Vieille	CEPF	Grant Director for the MADIO hotspot
2	Pierre Carret	CEPF	Grant Director for Mediterranean Basin hotspot (former Grant Director for MADIO hotspot)
3	Jack Tordoff	CEPF	Managing Director
4	Olivier Langrand	CEPF	Executive Director
5	Antonia Cermak-Terzian	CEPF	Director Of Grants Management
<b>RIT STAFF</b>			
6	Monique Randriatsivery	Tany Meva Foundation (TMF)	RIT Team Leader
7	Rindra Andriamahefasoa	TMF	RIT Project Manager
8	Rivo Fanomezantsoa Andriatsimatahomanana	TMF	RIT Project Manager
9	Anicet Josué Rakotoarisoa	TMF	RIT Project Manager
10	Herivola Andriampenomanana	TMF	Financial Analyst
<b>HOST ORGANIZATION STAFF</b>			
11	Claude Fanohiza	TMF	Chief Executive
12	Tantely Ratotoarimanana	TMF	Lead Programme Manager
<b>PREVIOUS RIT STAFF/CONSULTANTS</b>			
13	Olivier Tyack	Independent	Former RIT Consultant for Mauritius and Seychelles
14	Sohibou Mhoumadi	Independent	Former RIT Consultant for Comoros
15	Ravaka Ranaivoson	-	Former RIT Leader
16	Eric Ramarijaona	-	Previous MADIO Grant Manager
<b>CEPF GRANTEES</b>			
17	Tiana Andriamana	Fanamby	Grantee - Madagascar
18	Luciano Andriamaro	Conservation International	Grantee - Madagascar
19	Belalahy Rodriguez	madagasikara Voakajy	Grantee - Madagascar
20	Lindsay Azie Rodriguez	Ter Mer Rodriguez Association	Grantee - Mauritius

21	Said Ahamada	l'Association d'Intervention pour le Développement et l'Environnement	Grantee - Comoros
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