

Climate, Environment and Nature (CLEAN) Helpdesk Technical Assistance Facility: Terms of Reference for Roster of Experts

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1. Climate, Environment, and Nature (CLEAN) Helpdesk.

1.1. Overview of the CLEAN Helpdesk

The Climate, Environment, and Nature (CLEAN) Helpdesk has been established to improve UK government capacity on climate, environment and nature mainstreaming to improve outcomes for people and nature. The CLEAN Helpdesk builds on and succeeds the Climate Mainstreaming Facility (CMF) with new additional dedicated resources to rapidly bolster the capacity of UK officials to integrate CEN considerations and increase Paris Alignment at a policy, portfolio and programmatic level. The resources will support Programme Operating Framework Rule 5 (PrOF5) compliance activities and ensure that any Official Development Aid (ODA) spending does no harm to nature and supports Gender, Equity, Disability, and Social Inclusion (GEDSI) in all operations. Its expected result is FCDO delivering better on UK policy commitments, notably following the 2030 Strategic Framework for International Climate and Nature Action, and ensure good use of UK government resources, notably International Climate Finance (ICF).

The CLEAN Helpdesk includes a central online platform as a key function as a 'one-stop-shop', which houses an online knowledge repository, where UK government officials can access useful online resources, guidance documents, and previous completed requests. Using the platform, UK government officials are able to access information on other UK technical assistance offers. Using an online form, UK government officials are able to submit a request for support that can be responded to by the CLEAN Helpdesk or passed on to another technical assistance facility as appropriate. This makes it quicker and easier to access CEN information and improves coordination and coherence across different government departments and offices. This ensures better coordination and uptake across the various technical assistance facilities available to UK government officials.

The CLEAN Helpdesk will engage with FCDO and Other Government Department (OGD) staff spending ODA. Like the CMF, it will mobilise both regional and international technical experts to offer bespoke, on-call advice. That advice will cover a wide range of potentials and risks regarding CEN in ODA policies, strategies, programmes, operations, and procedures.

1.2. Context and rationale

In 2019, the UK committed to align all its ODA with the Paris Agreement on climate change, a commitment reaffirmed in the 2021 Integrated Review. Additionally, the UK pledged to integrate environmental considerations into its ODA, ensuring that all new bilateral aid does not harm nature. This is part of a broader commitment to allocate at least £3 billion of ICF towards environmental protection by 2026. These commitments were reiterated in the Strategic Framework 2030. The PrOF mandates that all new bilateral ODA spending adhere to these environmental standards and properly account for ICF expenditures and outcomes. In line with these commitments, the UK government has established the CLEAN Helpdesk, operational until 31 March 2026, to provide technical assistance and support UK climate mainstreaming initiatives. The CLEAN Helpdesk is managed by the Energy, Climate, and Environment Directorate (ECED) through an Accountable Grant.

1.3. What kind of support does the CLEAN Helpdesk offer?

The CLEAN Helpdesk, like the CMF, offers flexible, demand-led, in-country (when necessary and possible), call-down technical advice. The shaping of the on-request advisory services are inclined to climate as the scope of demand is informed by the CMF and the inception phase of the CLEAN Helpdesk.

Support will be tailored to the needs of the individual UK government official request, but could include the following areas of support:

1. Identifying risks and opportunities to realise the sustainable development potentials of CEN in ODA programmes. This includes integrating current and future climate risks into the concept note and business case phase of new programmes, an important aspect of applying FCDO's Climate and Environment Risk Assessment guidance.
2. Identifying and realising the climate mitigation and adaptation potentials of CEN to provide an initial scoping of potential climate mainstreaming opportunities and ICF indicators.
 - a. This includes design of inclusive climate adaptation activities, as part of the mainstreaming of climate change into programme design (concept notes and business cases) and Theories of Change.
 - b. Assisting with analysis for the allocation of International Climate Finance in programme budgets.
3. Identifying underlying barriers to integrating and addressing CEN in programmes to improve ODA's humanitarian and development work.
4. Informing and improving FCDO and OGD's internal CEN policies, plans, and processes.
5. Advising on national-level CEN policies, plans, and standards in ODA countries.
6. Demonstrating FCDO and OGD's ODA CEN contributions and how the work might be scaled.
7. Tracking down data and information on CEN and their economic, social and developmental implications; and translating into user-friendly advice.
8. Offering more strategic and practical CEN narratives, definitions and principles to help progress at the programme and country office level.

9. Undertake GEDSI analyses, identify opportunities to promote GEDSI within CEN programmes and to design accessible and inclusive solutions. This will involve taking an intersectional approach and systematically considering the differences between the conditions, situations, needs and outcomes of people based on factors including but not limited to age, disability status, gender identity and sexual orientation, and race
10. Advising on GEDSI responsive monitoring, evaluating and lesson-learning about CEN within FCDO and OGD spend (e.g. appropriate KPIs to track climate benefits, informing communities of practice).

1.4. Eligibility and indicative time allocation for requests

Any UK Government department, office, or agency that makes use of ODA spend is eligible to make a request under the CLEAN Helpdesk. The CLEAN Helpdesk offers up to a maximum of 20 days of expert support from central funding of the facility. Any additional support (above these 20 days) will be assessed by the FCDO on a case-by-case basis. It is recognised that there may be significant variation according to the individual context and team needs.

1.5. Consolidation and learning

A key objective of the CLEAN Helpdesk is to facilitate learning and knowledge exchange between FCDO offices and create coherence across CEN programming. Additionally, the helpdesk aims to increase the capacity of UK government officials to implement CEN programming. To this end, the CLEAN Helpdesk monitors the demand for CEN integration, and the uptake of CEN considerations across ODA spending departments. Helpdesk partners are asked to participate in assessing the nature of demand of FCDO country offices and departments by completing a consultant feedback form. They are also asked to provide feedback on their experience using the CLEAN Helpdesk. This is done to ensure that the functioning and operations of the Helpdesk are constantly improved for better service delivery. Further support may include participating in FCDO learning events, as well as developing learning resources (e.g. sector-focused best practice case studies, GEDSI best practice, and/or contributions to updated guidance on climate mainstreaming).

2. Helpdesk Governance

The CLEAN Helpdesk is managed by a CLEAN Consortium Delivery team (SSN, PWA, ODI, and SDDirect), which reports to an FCDO PRO and SRO, and Programme Delivery Board. The Consortium Delivery team's responsibilities include:

- Pre-screening applicants to the Helpdesk Roster of Experts (via the EOI submission process).
- Manage the ROE, including directing experts to relevant previous outputs.
- Match Requests for Services (RFS) appropriate experts on the ROE.
- Brokering relationships between FCDO country offices and departments who have requested support and the assigned expert from the ROE.
- Review and quality assurance of outputs by the ROE.
- Ensuring GEDSI sensitivity and integration across Helpdesk outputs.
- Monitoring of Helpdesk outputs and outcomes.
- Commissioning and reviewing learning outputs from Helpdesk work for wider learning within FCDO.

The CLEAN Helpdesk evolved out of the Climate Mainstreaming Facility (CMF), which was managed by SSN and PWA, and provided support to various FCDO country offices and departments. The CLEAN Delivery expanded on this and added SDDirect and ODI as partners to meet the needs of the increased scope of the CLEAN Helpdesk. All consortium partners have extensive experience globally and across a variety of CEN and GEDSI programmes and projects. Accordingly, partners in the CLEAN Delivery Consortium are responsible for both the management of the Helpdesk (as captured in this TOR), and for responding to some of the RFSs under the Helpdesk.

The CLEAN Helpdesk makes use of the following governance boards and meetings:

2.1. The Programme Delivery Board of other Technical Assistance Facilities

This Programme Delivery Board of other TA facilities is made up of representatives from the CLEAN Delivery Consortium, the CLEAN PRO and SRO, and representatives from other FCDO-funded technical assistance facilities. The board was established with the aim to agree on the engagement and governance processes with other FCDO technical assistance facilities. The board meets to discuss.

- Referring relevant TA requests to facilities, receiving requests relevant to CLEAN;
- Understanding the mandates of the TA facilities;
- Opportunities for strategic collaboration.

2.2. Strategic Steering meeting

The strategic steering meeting is made up of representatives from the CLEAN Delivery consortium and FCDO. The strategic meeting addresses:

- The direction on CLEAN Helpdesk;
- Progress of the CLEAN Helpdesk against agreed outcomes, including meeting the strategic objectives in the GEDSI strategy;
- Opportunities for strategic collaboration.

2.3. Operational Delivery Meeting

The operational delivery meeting is made up of CLEAN Delivery Consortium Leads and the programme PRO and SRO. This meeting was established to discuss the particulars of requests made through the CLEAN Helpdesk. The scope of discussions/deliberations (not limited to):

- Setting the strategic vision
- Increase in the number or days of a request
- Repeat requests
- Scope outside of the CLEAN mandate
- High Expert fees
- Expertise
- Delivery risks
- GEDSI mainstreaming

3. Helpdesk operating procedures

3.1. How does the CLEAN Helpdesk work?

The following key steps detail the operation of the CLEAN Helpdesk:

- **Step 1 – A request for support is made to the CLEAN Helpdesk:** A UK official completes a request for support online form via the CLEAN Helpdesk online platform. Once this form is submitted, it is received immediately by a CLEAN Helpdesk officer. Annex 1 of this document details the process for making a request for support via the CLEAN Helpdesk online platform.
- **Step 2 – Screening of request form by the CLEAN Helpdesk:** The CLEAN Helpdesk team will screen the request to determine whether the work falls within the CLEAN Helpdesk scope, the ability of the CLEAN Helpdesk to provide support on the request, and opportunities for GEDSI mainstreaming. Where the request does not fall under the CLEAN Helpdesk, the Helpdesk team will refer the point of contact to another better suited technical assistance facility.
- **Step 3 – CLEAN Helpdesk initial response to requester:** The CLEAN Helpdesk endeavors to respond as soon as possible, but will take no longer than 10 working days. A helpdesk officer will set up an initial meeting with the point of contact. The following will be discussed:
 - Any queries concerning the request;
 - Summarising the purpose and scope of the request;
 - Identifying potential experts who could respond;
 - Checking any possible conflicts of interest;
 - Identifying any milestones that delivery needs to take place before;
 - Developing a broad ToR, identifying GEDSI considerations.
- **Step 4 – Requester gives go-ahead for the proposed expertise and ToR:** This may involve some fine-tuning, and will be done so as to help finalise the ToR for the selected expert individuals or teams.
- **Step 5 – Appointment of expert(s):** The CLEAN Helpdesk team will appoint selected and available experts as agreed above. If a team is needed to conduct the required work, the team members may be identified by the CLEAN Helpdesk. Depending on the request, this may include dedicated GEDSI expertise alongside CEN expertise. The expert(s) will be issued with a consultancy contract from SSN to provide the required services. Fee rates will be negotiable during the Trial Phase. Non-disclosure agreements will be signed when the expert submits an Expression of Interest.
- **Step 6 – Expert(s) undertake the request for support:** Experts appointed will undertake the request following the ToR, providing the agreed output within the agreed timeframe.
- **Step 7 – Review and quality assurance:** Thematic/technical leads on the CLEAN Helpdesk Roster of Experts, the CLEAN Helpdesk management team, and the point of contact will review the output, providing a response. This will include a GEDSI review. In

cases where the output was prepared by CLEAN Helpdesk team alone, independent peer review will be arranged.

- **Step 8 – Remedial work:** Should the CLEAN Helpdesk team and the point of contact deem the work not to be to the appropriate standard detailed instructions and an appropriate timeline will be provided to the expert to rectify the work.
- **Step 9 – Delivery of the revised output to the original requester:** Once the outputs have been approved, the revised output will be delivered to the original requester and copied to the CLEAN Helpdesk MEL team.
- **Step 10 – Monitoring and evaluation:** Both the requester and the appointed experts undertaking the assignment will be asked to provide feedback in the form of a short survey on the process (information and briefing provided, collaboration and supervision, timing and resourcing, challenges and solutions, etc) and results where applicable. The requester may also be invited to a 45-minute call with the CLEAN Helpdesk team within one-year of assignment completion, to aid the CLEAN Helpdesk team in producing a case study on how the assignment has been used. Monitoring and evaluation of the CLEAN Helpdesk is intended to provide useful learning for the CLEAN Helpdesk and FCDO, in order to adapt the service delivery and develop institutional learning.
- **Step 11 - Knowledge Products are added to the CLEAN Helpdesk online knowledge repository:** All outputs are assessed to see if they are internal or public facing. Public-facing outputs will be uploaded onto the knowledge repository on the online platform. Key learnings and knowledge pieces will also be created and uploaded.

3.2. Selecting and managing the Roster of Experts (RoE)

The CLEAN Helpdesk team will pre-screen prospective experts for appropriate skills and experience that match the TOR for the Helpdesk. All procurement of experts will be done by SSN. The RoE will include a diverse range of thematic experts (CEN and GEDSI) who can be called to support the delivery of RFS. The RoE will also include thematic/technical leads who will provide a review and quality assurance function for the work produced by consultants for the CLEAN Helpdesk.

The process for joining the RoE is as follows:

- Interested experts must submit an Expressions of Interest (EOI) and be pre-screened by the CLEAN Helpdesk team to be included on the ROE, and be eligible for work under the Helpdesk. Applicants will be pre-screened to ensure they have demonstrable expertise to meet the areas listed in Section 1.3 of this TOR. The applicants will be reviewed against the criteria under Section 3.3.
- SSN has issued a public call for EOIs for consultants to be added to the ROE. The call is hosted on the CLEAN Helpdesk website and the SSN website (www.southsouthnorth.org) and is advertised via relevant online forums and mailing lists. Applicants will submit their EOI via an online form. The form will also be available on the CLEAN Helpdesk online platform as an ongoing/open call.

- If appropriate expertise cannot be sourced through the call for EOIs, the CLEAN Helpdesk Delivery Consortium will seek out further experts for the ROE.
- Experts will be asked to provide indicative availability from May 2024 until August 2024. However, there is no obligation for SSN to provide experts on the ROE with work, nor is there a guarantee that they will be issued requests for services. Similarly, successful applicants included in the ROE have no obligation to undertake any RFS issued by the CLEAN Helpdesk.
- The CLEAN Helpdesk makes use of a rate card in line with existing FCDO call down rate agreements for short-term work (i.e. less than 80 days). Applicants for the ROE will be asked to submit day rates for support. Indicative day rates based on expertise can be seen in Table 1. below.

Table 1. Expert Rate Card for the CLEAN Helpdesk (in-line with FCDO rate card)

Expert Band	Capped Rate	Description
Principal Consultant	£ 850	Internationally recognised expert in their field with exceptional knowledge of the subject area and extensive sectoral and/or regional expertise. Will have outstanding capabilities to conceptualise, design, and deliver complex interventions in a timely fashion. It is expected that a principal consultant will have a minimum of 15 years professional experience relevant to their field.
Senior Consultant	£ 700	Exceptional knowledge of the subject area with extensive sectoral and/or regional expertise and proven ability to translate theory into practice. Will have proven capability to undertake team leader functions and provide quality assurance of other consultants work. It is expected that a senior consultant will have a minimum of 10 years professional experience relevant to their field.
Consultant	£ 530	Thorough theoretical knowledge of the subject area with proven ability to translate theory into practice. Will have proven capability to provide quality assurance of other consultants' work. Will have recognised, independently verified qualifications, i.e. through professional body membership. It is expected that a consultant will have a minimum of 5 years professional experience relevant to their field.

3.3. Review and quality assurance

The ROE will also include thematic/ technical leads who will provide a review and quality assurance function. These thematic/ technical leads are regarded as experts in their field and will have significant work experience and expertise in a specific area. Many of these thematic/technical leads have experience working with FCDO and the Climate Mainstreaming Facility (CMF), the predecessor to the CLEAN Helpdesk. Additionally, thematic/technical leads will also review outputs to ensure that GEDSI considerations are accurately reflected in the CLEAN Helpdesk outputs.

3.4. Evaluation criteria for experts to be shortlisted

Evaluation Criteria for ROE applications EOIs from consultants will be evaluated according to the following criteria:

Table 2. Evaluation criteria for ROE applicants

Criteria	Description	Weighting
Qualifications	Does the consultant have a relevant degree? • N = 0 • Bachelors = 5 pts • Masters and higher (or equivalent) = 10 pts	10%
Years of Experience	How many years experience does the consultant have? • Less than 5 years = 0 pts • 5 years = 5 pts • One additional point for each year up to 10 years = 10 pts	10%
Relevant Thematic Expertise	Does the consultant have previous experience in Climate, Environment and Nature mainstreaming? <i>or</i> Does the consultant have experience integrating GEDSI into programming and policy? Examples: Developing Concept and Guidance Notes; Business Cases; Policy and Programme Reviews; ToCs; and EOIs. • 2 pts per noted project, up to 5 projects.	30%
Experience working with FCDO/ other Bilateral and Multilateral Partners	Does the consultant have experience working with FCDO processes and systems? Does the consultant have experience working with other bilateral or multilateral partners? • Significant experience working with bilateral and multilateral agencies = 5 pts • Significant experience working with FCDO= 10 pts	30%
Country-specific experience	Has the consultant worked in specified countries (for country-specific call-down support)?	20%

	• 2 pts per noted project, up to 5 projects.	
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Annex 1 | Process for making a request under the CLEAN Helpdesk

Any UK government official who has a request for support on climate, environment, or nature issues may visit the online CLEAN Helpdesk Platform. Based on the nature of their query or request, they will be prompted to complete the relevant online form. Table 4 provides an overview of the different channels for requesting support through the CLEAN Helpdesk.

Table 4. Channels for requesting support through the CLEAN Helpdesk.

Type of Queries /Requests:	Request for existing information or guidance on a CEN topic.	Request for Support on CEN or Paris Alignment	Requests outside of the Scope of the CLEAN Helpdesk.	General Queries on how the CLEAN Helpdesk works.
Process for requesting support:	Request for the CLEAN Helpdesk to share existing materials. Users will be directed to the online knowledge repository. If they cannot find what they need there, they will be able to make a request for information via an online form on the gateway platform.	Expert advice on logframes, business cases, theories of change, annual reviews and programme completion reviews, and GEDSI mainstreaming support. In-depth guidance for programmes and policy development across different sectors that may include desk research and stakeholder interviews.	Queries that are out of scope and better responded to by an alternative TA facility will be passed on to the best-suited TA facility. For example, a specific request, such as, a piece on the developmental potential of spending on nature in ODA countries, may better be supported by the Nature Facility.	General queries on how to use the gateway platform and what the CLEAN does.