



# Terms of Reference

## Social Studies of the Amigos de Calakmul Community Forest Conservation Project

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**CONFIDENTIAL**

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### **1 Background**

#### **1.1 Company Overview**

Founded in 2006, Terra Global is a woman-founded, woman-run, and women-owned for-profit social enterprise and small business delivering 20 years of passion and persistence for people and the planet. Terra Global's mission is to facilitate financially, socially, and environmentally sustainable landscapes. Terra Global is a global leader in sustainable forest and agriculture program development, land-use greenhouse gas quantification and finance, and providing technical expertise and investment capital to their global client base in a collaborative and innovative manner. Having worked in 40+ countries, Terra Global has designed and supported the implementation of REDD+ and other sustainable landscape programs from the project to national scale.

#### **1.2 Project Background**

The Amigos de Calakmul Community Forest Conservation Project (ACAC Project) supports Ejidos located in the buffer zones and area of influence of the Calakmul Biosphere Reserve (CBR) in the Yucatán Peninsula, across the states of Campeche, Quintana Roo, and Yucatán, to conserve their forests. These Ejidos have the legal right to harvest timber, which, due to social and political factors, would result in forest degradation and habitat loss in this key biodiversity corridor in Central America. ACAC has been working with ejido communities in these areas for more than 19 years. The ACAC Project provides conservation payments and supports additional livelihood programs that compensate the Ejidos for the opportunity cost of not using their forests for timber extraction; participating Ejidos sign legally binding permanent conservation agreements in order to conserve their forests.

The ACAC Project aims to conserve 210,000 hectares of forest lands protected from logging-related degradation. At present, 11 Ejidos, where more than 3,200 families live, are committed to the Project, with a total area of approximately 161,740 hectares. The ACAC Project is currently conducting consultations through ejido assemblies to complete enrollment of 15 ejidos and 210,000 hectares.

### **2 Objective of the RFP**

This document contains the Terms of Reference and Scope of Services for the local subcontractor that Terra Global will hire to support field activities for monitoring the socio-economic aspects of the Community Forest

Conservation Project (ACAC). It also describes the expected application process in accordance with Terra Global’s procurement procedures.

For the purpose of preparing Monitoring Report 2 for verification under the Verified Carbon Standard (VCS) and the Climate, Community & Biodiversity (CCB) Standards, this document describes the methodologies for collecting data social data using the two different methods that subcontractor must carry out.

These include:

- Household Surveys (HHS)
- Participatory Rural Appraisals (PRA)

### 3 Eligible Entities

This RFP is open to NGOs, private organizations, civil society organizations, government entities, industry groups, cooperatives, and/or individual consultants. Proposals must be submitted in the format described below and must include all required information and forms. Only complete and eligible applications will be reviewed and scored by an evaluation committee.

### 4 Application Process

The general process Terra Global will use to solicit, review, and select the consultant will follow the steps below:

April 29, 2026	Publication of the Terms of Reference (TOR)
May 15 2026	Question-and-answer period on the TOR between Terra Global and potential applicants.
May 20, 2026	Applications to be received by.
May 21-27, 2026	<ul style="list-style-type: none"> <li>• Preliminary review to assess eligibility.</li> <li>• Eligible applications are independently reviewed and scored by the evaluation committee.</li> </ul>
May 28, 2026	Clarification period and selection of the final applicant until
May 30, 2026	Negotiate the award and finalize the contract by

### 5 Proposal Components

Applications must include details on the following two components and must submit the following information, including but not limited to:

#### 5.1 Technical Proposal

Technical proposal demonstrating the applicant’s plan to achieve the scope of work and the applicant’s technical capacity to carry out the proposed activities. The technical proposal should include the approach, past performance, and staff experience. Include the following components in the Technical Proposal, not to exceed 15 pages, excluding CVs:

- a) Organizational Background and experience
- b) Detailed list of deliverables, and how you will approach completing them
  1. Activities for each Deliverable and Work schedule
- c) CVs and biographies of key personnel, including their role in the Deliverables
- d) 2 References for previous work related to the scope presented in these TOR.

#### 5.2 Financial Proposal

Financial proposal showing the proposed costs for each deliverable, including third-party costs or other direct costs associated with the scope of work. In addition to budget spreadsheets, all financial proposals must include detailed written cost notes explaining the assumptions and actual cost items in the financial proposal.

This will allow the bidder to explain the financial proposal in terms that may not be immediately evident in the cost spreadsheets. These cost notes will also help the Evaluation Committee understand how the bidder established the budget.

Note that any equipment purchased to perform the Deliverables included in the budget, for more than USD \$500 shall be returned to Terra Global prior to the final payment.

### 5.3 How to Apply

Applicants must submit their proposal, and all required supporting documentation electronically to: info@terraglobalcapital.com

Upon receipt of a proposal under these Terms of Reference, the Evaluation Committee will acknowledge receipt within 48 hours. If confirmation is not received within this period, applicants must resend an email to info@terraglobalcapital.com to confirm receipt.

## 6 Evaluation Procedures

### 6.1 Preliminary Review

All applications will undergo a preliminary review based on the following criteria:

- Administrative compliance: to verify that the application is complete and includes all requested sections and annexes.
- Eligibility: to verify that the applicant is eligible based on the general eligibility requirements.

### 6.2 Evaluation Criteria and Review

Once the preliminary review is completed, applications deemed eligible will undergo a more thorough review.

The following set of criteria will be used by the Evaluation Committee:

- Sector experience
- Experience related to the specific scope of work
- Knowledge of the local communities and experience in the local area
- Proven experience in similar data collection and use of required technology (as applicable)
- Incorporation of local hires
- Cost of the proposal
- Availability and proposed scheduling

Shortlisted applicants may be asked to address certain concerns of the evaluation committee, which may include budget reasonableness, amendments to the technical proposal, requests for additional information, or any other concerns the committee may have.

## 7 Scope of Deliverables for the Contractor

### 7.1 Deliverables

The Contractor will be responsible for the following deliverables, which must be completed in accordance with the Standard Operating Procedures (SOPs) defined by Terra Global for Participatory Rural Appraisals (PRA) and Household Surveys (HHS). This consultancy must be completed within 3 calendar months (60 working days).

#### *Deliverables*

Deliverables	Details
Contract signature	<ul style="list-style-type: none"> <li>• Signed contract</li> </ul>

Deliverables	Details
Inception Report	<ul style="list-style-type: none"> <li>• Full feedback on the HHS and PRA SOPs</li> <li>• Proposed schedule and locations for the Household Surveys and PRAs to be conducted with a written field trip agenda</li> <li>• Evidence that field team training was completed</li> </ul>
Field Data Collection Completed	<ul style="list-style-type: none"> <li>• Total household surveys uploaded to the platform (KoboToolbox)</li> <li>• PRA data submitted in the required format (Excel) with field data sheets</li> </ul>
Final Report and Databases	<ul style="list-style-type: none"> <li>• Final round of QA/QC of the data</li> <li>• Final Kobo and Excel databases reviewed and approved by Terra</li> <li>• Household Survey (HHS) and PRA reports</li> </ul>

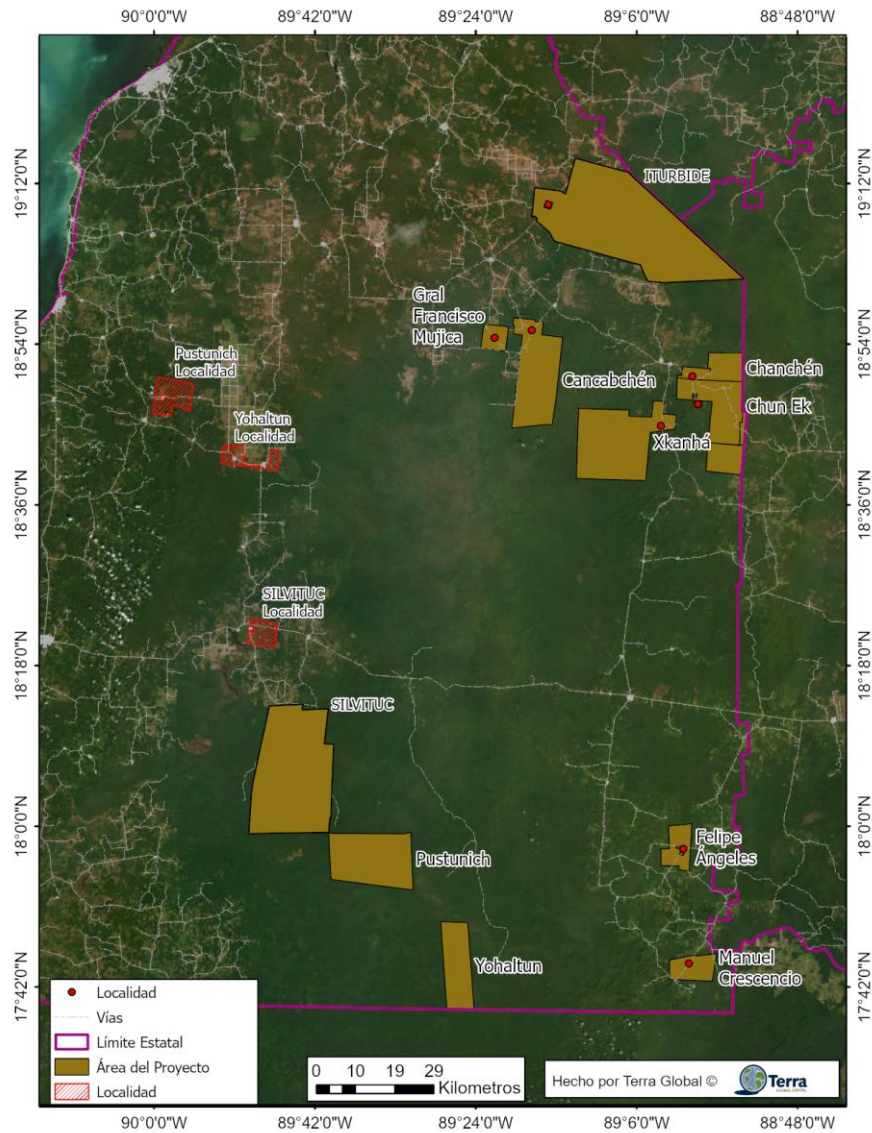
## 7.2 Communities and Place of Data Collection

The study will be carried out in the area of influence of the Calakmul Biosphere Reserve (CBR) in the Yucatán Peninsula, across the states of Campeche, Quintana Roo, and Yucatán, Mexico, over an area of 210,000 hectares. Table 1 shows the ejidos currently included in the project; the final list of 15 ejidos will be shared with the subcontractor prior to contract signature. Map 1 shows the 11 ejidos currently included in the project.

**Table 1. Population and ejidatario data for the ejidos to be visited**

Ejido	Ejidatarios	Ejidatarios	Ejidatarios	Municipality, State	Population	Indigenous groups within the ejido
	Women	Men	Total			
Yohaltún	16	61	77	Champotón, Campeche	666	
Pustunich	8	105	113	Champotón, Campeche	725	
Manuel Crescencia Rejón	4	40	44	Calakmul, Campeche	324	Maya, Chol, and Tzotzil
Cancabchén	4	71	75	Hopelchén, Campeche	647	Maya
General Francisco J. Mújica	2	15	17	Hopelchén, Campeche	96	Maya
Chun Ek	1	20	21	Hopelchén, Campeche	203	Maya
Chanchén	1	48	49	Hopelchén, Campeche	323	Maya
Xkanhá	10	105	115	Hopelchén, Campeche	476	Maya
Felipe Ángeles	10	63	73	Othón P. Blanco, Quintana Roo	344	
Silvituc	15	49	64	Escárcega, Campeche	985	Maya

Ejido	Ejidatarios	Ejidatarios	Ejidatarios	Municipality, State	Population	Indigenous groups within the ejido
	Women	Men	Total			
Vicente "Iturbide" Guerrero	38	461	499	Hopelchén, Campeche	3,570	Maya
Ejidos in the process of joining the project	44	451	485	Hopelchén, Campeche; Othón P. Blanco, Quintana Roo	2,508	Maya
Total	153	1,489	1,642		10,867	



**Map 1. Location of the ejidos to be visited**

### 7.3 Number of Surveys

The total number of ejidatarios in the project area is 1,632, of whom 322 ejidatarios will be surveyed at a 95% confidence level and a 5% margin of error.

Study Method	# Ejidos	# Surveys
PRA	15	15
Household Surveys	322	322

However, if field conditions require that more interviews be conducted (up to an additional 15%, depending on the final list of ejidos that are in the process of joining the program), Terra may, at its discretion, instruct the consultant to conduct additional interviews and/or participatory rural appraisals.

### 7.4 Activities by Deliverable

#### 7.4.1 Inception Report (Pre-Field Deployment)

2. Review Terra’s Standard Operating Procedure (SOP) for HHS and PRA and provide feedback on the questionnaires and the proposed sampling design.
3. Train its staff (enumerators/data entry staff, facilitators) to follow the SOP for both the Participatory Rural Appraisals and the Household Survey.
4. Work collaboratively with Terra Global, the local implementer Amigos de Calakmul A.C. (ACAC), and their team in planning the fieldwork. Carry out the required coordination and communication directly with ejido and community representatives.
5. Prepare and submit an inception report (3–4 pages) to Terra Global indicating the schedule, location, and distribution of the surveys and assessments to be conducted.
6. Have the necessary equipment to carry out data collection (smartphones and/or tablets).
7. Verify that all field enumerators have geotagging enabled on their phones or are equipped with a GPS device to geotag the location of each survey collected in the field. Surveys that are not geotagged will not be approved.

### 7.5 Field Data Collection Completed

#### 7.5.1 Activities for the Participatory Rural Appraisal (PRA)

8. Conduct 15 PRAs using the SOP with each ejido, including natural resource use and extraction analysis, as well as the socioeconomic well-being of the ejidos during the monitoring period. The exercise aims to assess whether the activities implemented by the project are producing the expected results and whether project benefits are reaching the intended beneficiaries. For this reason, traditionally underrepresented groups must be included, such as youth, women (9% of total ejidatarios), elders, Indigenous people, and others according to the context of each ejido.
9. Conduct PRAs in the communities surrounding the project areas to determine whether there is potential for illegal tree extraction from the project area, encroachment of illegal activities into the project area, and other related information, including the species most commonly harvested.
10. Follow the SOP for Participatory Rural Appraisals while in the field.
11. Teams must take geotagged photos of the facilitated PRA exercises while in the field with the communities.
12. Record all data in the Excel format provided by Terra in accordance with the SOP for Participatory Rural Appraisals.
13. Verify that all images are geotagged before completing field activities. Images that are not geotagged will not be approved.

## 7.5.2 Activities for the Household Surveys (HHS)

14. Follow the SOP for Household Surveys while in the field.
15. Teams will conduct 322 HH surveys collecting data in Kobotool Box in the 15 communities identified by Terra Global.

Survey categories include:

- Household sociodemographic characteristics
- Income and access to credit
- Entrepreneurship
- Land tenure
- Agroforestry
- Irrigation systems
- Livestock production
- Food and agriculture
- Markets and organizations
- Energy types and cookstoves
- Fuelwood use
- Wood harvesting and use
- Natural resource management
- Poaching
- Water and health
- Access to education
- Use of wood and topic awareness

16. The team leader must set up a Kobo Toolbox account registered on the Server. This username and password will be shared with the enumerators.
17. Ensure that each enumerator has a unique identification number.
18. Data collection in the field will be carried out on mobile devices/tablets that require location tracking. This location can be captured without internet connectivity, but the enumerator must enable geolocation permission in the Kobo Collect application.
19. Make sure the survey is successfully downloaded on all devices, and that a test is conducted both with and without internet connectivity.
20. Enumerators must ensure that all questions are answered and, when the respondent is unwilling to answer, the option “not willing to answer” must be selected.
21. At the end of the survey, it must be validated before being submitted. Make sure to save the form as finalized before sending it, especially when working offline.

## 7.6 Final Report and Databases

### 7.6.1 Participatory Rural Appraisal (PRA)

22. Verify that all images are geotagged and organized into folders labeled for each community.
23. Scan field data sheets and community maps and send them to Terra Global.
24. Gather all field data sheets, store them carefully, and deliver them to the Project partner, ACAC, according to Terra’s instructions.
25. Use the Excel workbook provided by Terra to enter all collected data.
26. A person who did not participate in field data collection must carry out an appropriate review and spot checks of the Excel data against the field data sheets and complete the first round of quality assurance/quality control (QA/QC) on the Excel data.

27. Submit the complete PRA data in the Excel workbook to Terra Global for the second round of QA/QC.
28. Complete the final QA/QC of the PRA data once Terra Global confirms that the data are reasonably complete.
29. Provide a report (~10–20 pages) describing the key variables collected from the communities.

#### 7.6.2 Household Surveys (HHS)

30. 1. Verify that all surveys are in the cloud and share the information status with Terra Global.
31. 2. A person who did not participate in field data collection must carry out an appropriate review and spot checks of the surveys, completing the first round of quality assurance/quality control (QA/QC) on the data.
32. 3. Submit the complete household data to Terra Global for the second round of QA/QC.
33. 4. Complete the final QA/QC of the survey data once Terra Global confirms that the data are reasonably complete.
34. 5. Provide a report (~10–20 pages) with summaries of the most relevant findings by category and by community from the survey.

#### 7.6.3 Final Data Delivery

35. The Contractor shall submit to Terra Global the complete final data package for both the Participatory Rural Appraisals (PRA) and Household Surveys (HHS). The final data package must include, at minimum:
  - Final KoboToolbox database for the Household Surveys, including all completed surveys, metadata, enumerator identifiers, timestamps, and geolocation data.
  - Final Excel database for the Participatory Rural Appraisals, using the format provided by Terra Global.
  - Scanned field data sheets, community maps, attendance lists, and any other original PRA documentation collected during the field activities.
  - Geotagged photographic evidence organized by ejido/community and clearly labeled.
  - Final HHS report and final PRA report, including summaries of key findings by category and by community.
  - Documentation of the first and final rounds of QA/QC carried out by the Contractor.
  - A short data delivery memo summarizing the contents of the final package, any limitations, missing data, inconsistencies identified, and corrective actions taken.
36. All data and reports must be submitted in editable formats acceptable to Terra Global, including Excel, Word, KoboToolbox exports, PDF scans, image files, and any other formats requested by Terra Global. The Contractor must ensure that all files are clearly named, organized by method and community, and delivered through a secure file-sharing system agreed with Terra Global.
37. Terra Global will review the final data package and may request clarifications, corrections, additional QA/QC, reformatting, or supporting documentation before approving the deliverable. The Contractor shall address all comments and requested revisions in a timely manner.
38. The final deliverable shall not be considered complete until Terra Global provides written approval confirming that the final databases, supporting documentation, and reports have been reviewed and accepted. Final payment will be conditional upon Terra Global's approval of the complete final data delivery package.

## 8 Type and Duration of Contract

A professional services contract will be signed between the consultant and Terra Global Capital LLC, with an expected duration of 3 months from the date of signature. This is a fixed price contract based payment Deliverables.

## 9 Targeted Deliverable Dates

### *Payment Schedule*

<b>Milestone</b>	<b>Details</b>	<b>%</b>	<b>Date</b>
1. Contract signature	<ul style="list-style-type: none"><li>Signed contract</li></ul>	20	Upon contract signature
2. Inception report	<ul style="list-style-type: none"><li>Full feedback on the SOPs</li><li>Schedule and general location of the surveys to be conducted</li><li>Evidence that field team training was completed</li></ul>	20	June 10, 2026
3. Field data delivered	<ul style="list-style-type: none"><li>Total household surveys uploaded to the platform</li><li>PRA data submitted in the required format</li></ul>	30	June 30, 2026
4. Final report	<ul style="list-style-type: none"><li>Final round of QA/QC of the data HHS and PRA report</li></ul>	30	July 15, 2026