

# Terms of Reference

## VSA Online Platform: Final Discovery, Prototype & Build

### 1. Background

IDH The Sustainable Trade Initiative is a Foundation convening companies, civil society organizations, governments and others in public-private partnerships. Through its partnerships, IDH aims to drive sustainability from niche to norm in mainstream markets, delivering impact on the Sustainable Development Goals. We focus on creating positive impact on deforestation, living incomes and living wages, working conditions and gender.

Today, sustainability commitments are topping the agendas of supply chain actors. Traders, processors, consumer-facing companies, producers and governments all have made commitments on sustainable production of commodities such as soy, palm oil, rubber, and beef. Yet no efficient and inexpensive option currently exists to guarantee supply of commodities that fulfil these commitments at scale.

The Verified Sourcing Area (VSA) model is a new responsible sourcing mechanism currently being developed by IDH and its partners. The VSA model brings together the producing region, supply chain actors and committed end buyers. In the producing region, a sustainability improvement deal (Compact) is made between private and public stakeholders at jurisdictional level, e.g. a municipality, district or province. Through the Compact, public and private stakeholders agree on priority sustainability topics and targets, the strategy to reach these targets incl. project pipeline, and the monitoring and reporting system. The VSA model thereby seeks to make best use of the strengths of each of the partners involved, making sustainability a joint responsibility between public and private sector.

At the core of the VSA model will be a two-sided online platform that connects Compacts with Buyers. Compact stakeholders register their sustainability goals and projects online and annually report on progress on key KPIs through the platform. Buyers use the platform to find Compacts in the regions they source from and support these Compacts through which they become Committed Buyers. Connections to partner data platforms enable exchange of other relevant data, such as geospatial remote sensing deforestation data or direct buyer-seller platforms. Through the platform, Committed Buyers can get a better understanding of their supply chains, reduce risks and improve sustainability by directly supporting the producing region. Compact stakeholders can, vice-versa, find Buyers who can support them in reaching their goals and monitor if Buyers deliver on the support they committed to. Beyond Compact stakeholders and Buyers, other parties that will use the VSA platform will include NGOs who can help develop Compacts and deliver technical insights; service providers who can offer

technical services to Committed Buyers and Compacts; and investors who can use the platform to access critical sustainability information and a pipeline of investable projects connected to Compacts.

More background information on VSAs in general can be found at [www.verifiedsourcingareas.org](http://www.verifiedsourcingareas.org). Detailed information regarding the VSA online platform can be obtained by requesting additional information (see section 2.2).

## 2. Project information

### 2.1 Scope and objective of this assignment

IDH is requesting the services of a consultant (firm) to design and build the VSA online platform working in close relationship with the VSA team at IDH.

The overall scope and objective of this assignment is to carry out the following activities:

- (i) Final Discovery and Prototype
- (ii) Build

The extent of phase (ii), Build, will aim at releasing a Minimum Viable Product (MVP). The exact extent of this phase will be determined by the discovery and prototype phase and the funding available.

Subject to the findings of the Final Discovery and Prototype phase, these are the desired characteristics of the platform to be built:

- Strong focus on user experience (UX)
- Compatibility with existing data platforms
- Flexible system architecture to accommodate a wide range of basic functionalities, diversity of user types and registration journeys, advanced and different-level administrator capacities

Specifically, the following minimum features are expected in the MVP stage, which may be complemented with other features after the Final Discovery and Prototype phase is completed:

- Registration of Compacts, baseline data, targets and indicators
- Registration of Committed Buyers, sustainability preferences
- Map function of global Compacts with overlay of relevant geospatial data, e.g. GlobalForestWatch
- Search function for commodities, sustainability issues, and regions
- A data reporting function for Compacts and Committed Buyers on select KPIs
- A smart feedback system to check data input for completeness
- Performance dashboards for Compacts and Buyers; including aggregate performance across Compacts for Buyers
- Customizable profile pages for Compacts and Buyers
- Rich content reporting by Compacts (e.g. blogs, video sharing) - stories

- Project pipelines for each Compact with details for each Project
- Static pages with guidelines for Compact design, general information for various users, etc.

IDH will provide a basic database of current Compacts, sustainability goals and KPIs, projects and stories including dummy data, as well as an overview of relevant 3<sup>rd</sup> party data sources and technical specifications of these data sources.

IDH will also provide basic materials describing the brand and visual identity of VSA, which will be updated from their current form. The consultant is expected to use these materials and develop the visual elements of the online platform as an extension of these materials.

## 2.2 Additional information

Additional information is available for parties interested in submitting a proposal. Upon sending a request to IDH, the following materials will be made available:

1. The draft “VSA Blueprint” describing the overall VSA model, the different users of the platform and the type of interaction they have with the platform, and services to be offered to them through the platform.
2. The VSA Go-To-Market Strategy describing different Buyer company personas, their main pain points and the value proposition of the VSA to these personas.

Upon start of the assignment, the following documents will be made available to the Consultant:

3. The VSA Compact Manual describing the process of developing a Compact, outlining further functionalities of the VSA online platform to be developed.
4. Two example user journeys developed in a previous Discover phase carried out with an external consultant, which will serve as reference material.

## 2.3 Specific tasks

### **Final Discovery & Prototype**

In this phase, the consultant is expected to synthesize information about the VSA online platform, its intended users, their needs and requirements. This will not start from scratch but will be informed by the documents listed under Section 2.2. The consultant is expected to use these documents and build on these to finalize the discovery phase.

In this phase, the consultant is expected to deliver a prototype of the VSA Online Platform with focus on two key user groups: Compact stakeholders and Committed Buyers.

For user testing, the consultant may propose an approach to optimize the time investment by external test users. IDH can mobilize two types of test users:

*Peer group:* A group of IDH staff and consultants who have previously worked in relevant capacities (e.g. as Compact stakeholder or as sustainability manager for a Buyer). This group may comprise 5 – 10 people who may test the prototype individually or in focus group setting.

*External test users:* A group of Buyer sustainability managers and Compact stakeholders (mostly external to IDH). IDH will organize the mobilization of these test users. A total of maximum 10 users can be mobilized, for whom the user testing commitment should be optimized. Out of the 10, maximum 3 will not be physically located in the Netherlands, for which a videoconferencing set-up will be organized by IDH.

Apart from the two types of test users, a group of broader stakeholders will need to be engaged to provide feedback on the prototype. This includes a group of maximum 20 people who may be consulted through a group review session or similar. IDH will mobilize these stakeholders and manage the feedback process to ensure consistency.

The output of this phase will be

- updated prototypes that will be used to build the platform;
- updated system architecture and list of functionalities for MVP;
- a plan to build the MVP through sprints;
- specification of server and network requirements to operate the MVP

## **Build**

In this phase, the consultant is expected to build the VSA online platform into an MVP. The Build phase is expected to be carried out in sprints, with a series of sprints each followed by a review. In this phase, the expectation is to work with the same set of external test users as in the prototype phase.

The output of this phase will be an MVP with basic functionalities, as agreed upon in the Final Discovery & Prototype phase.

## **2.4 Deliverables and timeline**

Below is the proposed timeline for this assignment with deliverables:

<b>Timeline</b>	
<b>What</b>	<b>When / duration</b>
Kick-off meeting	8 April 2020
Final Discovery and prototype	4-6 weeks
Build	2-3 weeks per sprint*

\* Depending on the outcome of the Final Discovery and prototype phase, MVP expected between early July and late August.

## 2.5 Method of work

The consultant is expected to carry out this work in close collaboration with the IDH VSA team based in Utrecht, the Netherlands. This may include joint working sessions either at the IDH office in Utrecht or at the location of the Consultant in the Netherlands if preferable by both parties. User testing may take place in different locations in the Netherlands, either on-site at the company of the test user, or at premises selected by the Consultant. The Consultant will include any costs for this in their budget.

IDH will provide the Product Owner, all other team members are to be provided by the Consultant. IDH has internal capacity on communications and legal aspects, which will not be part of the team but be used for consultation when required, which will be organized by the Product Owner. IDH has limited internal IT-related capacity and will depend on the Consultant for other roles in the design and build process. IDH has a limited number of internal policies and strategies relevant to the assignment, which include a data strategy (under development), communication policy, safeguards and privacy policies. These policies and strategies will be made available to the Consultant upon contract agreement.

## 2.6 Intellectual Property and data ownership

IDH will be the owner of all intellectual property arising from the performance of the assignment, including but not limited to copyrights, database rights, trademarks, patents and know how. Data ownership will remain with IDH or the party reporting or sharing the data, and will not be with the Consultant. Detailed procedures on data ownership, including compliance with data privacy regulations, will be established and agreed upon during contract negotiation.

## 2.7 Budget guidance

Interested parties are expected to submit a detailed budget (see 3.3 Proposal Requirements), which should be specified per Phase. For the Build Phase, a total budget and a budget per sprint is required. The overall assignment value cannot exceed EUR 200.000 excluding VAT.

# 3. Tender Process

This Request for Proposals is open to any consultant firm that meets the requirements set out in this chapter. Proposals must be submitted in accordance with the provisions of this chapter. The contract will be awarded on the basis of price and quality.

## 3.1 Selection procedure

The procedure for selecting the winning consultant firm to be contracted for this assignment will be as follows:

1. Inviting Consultants to submit a proposal based on these Terms of Reference.
2. Interested Consultants request additional information
3. Evaluation of the proposals by the IDH evaluation committee
4. Pitch by shortlisted parties\*
5. Decision on selection of the Consultant.
6. Kick-off meeting with the selected Consultant.

The associated timeline is as follows:

<b>Activity</b>	<b>Timeline</b>
Terms of Reference published	02/03/2020
Deadline for request of additional information	10/03/2020
Deadline for submission of proposal	23/03/2020
Shortlisting by IDH evaluation committee	24/03/2020
Pitch by shortlisted parties*	30/03/2020 – 01/04/2020
Selection of consultant and notification to applicants	02/04/2020
Kick-off meeting	08/04/2020

\* IDH may request shortlisted Consultants to a pitch session at the IDH HQ in Utrecht, Netherlands or via video conference.

### **3.2 Request for additional information and submission**

Interested parties may submit a request for the documentation listed in section 2.2., to Guido Rutten, Manager Verified Sourcing Areas, via e-mail to [rutten@idhtrade.org](mailto:rutten@idhtrade.org), before March 10, 2020, 23.59 CET.

Proposals must be submitted to Guido Rutten, Manager Verified Sourcing Areas, via e-mail to [rutten@idhtrade.org](mailto:rutten@idhtrade.org), before March 23, 2020, 23.59 CET.

***Only proposals received by 23.59 CET on March 23, 2020, will be considered***

### **3.3 Proposal requirements**

Applicants are expected to submit a complete proposal not more than ten pages (excluding CVs and sample work) in PDF format for this assignment including the following elements:

- A succinct, well-documented approach addressing the requirements set out in this TOR
- Minimum 3 explicit examples of previous work relevant to the deliverables in this TOR which are comparable in scope and complexity, including client references
- An overview of the proposed team composition, including key team members and possibly additional resource persons to be mobilized for specific tasks
- Curriculum Vitae of the proposed key team members
- The proposed budget in Euros incl. and excl. VAT:
  - A budget per phase; for the Build phase a budget per sprint
  - A breakdown of estimated time input and daily rates for each of the proposed team members,
  - An overview of other expected applicable expenses (international and/or local transport, accommodation as applicable).

#### **Grounds for exclusion**

Excluded from participation in the tender procedure and contracting is every party that is in one or more of the circumstances as referred to in Article 2.86 or 2.87 of Dutch Procurement Law.

### 3.4 Testing and Weighing

#### Evaluation

After the deadline has passed, the evaluation committee will evaluate the proposals. The proposals will first be checked for completeness. The absence of documents or elements in the proposal will lead to exclusion of the consultant from participation in the procedure. If the proposal is complete, the evaluation committee will evaluate the proposal against the criteria set below.

#### Selection Criteria

	Component	Description	Max points
1	Overall proposal	The extent to which the proposal meets the requirements set out in this TOR in terms of understanding of the assignment, its scope and related challenges.	30
2	Approach and way of working	The extent to which the proposal demonstrates an approach that can address the objectives set out in this TOR in an efficient and effective manner, supported by a structured process with clear roles and responsibilities for the Consultant team and the IDH team, with explicit requirements stated on IDH resources and test user commitment.	25
3	Track record	The previous experience in successfully performing assignments of a similar level of complexity and effort, e.g. the development of a two-sided platform or any similar website	20
4	Budget	The extent to which the proposed budget is reasonable compared to the proposal, comprising three elements: - The total budget (max 10 points) - The budget per sprint in the Build phase (max 10 points) - The applicable daily rates of team members (max 5 points)	25

## 4. Confidentiality

The Consultant will ensure that all its contacts with IDH, with regards to the Tender, during the tender procedure take place exclusively in writing by e-mail to Guido Rutten via [rutten@idhtrade.org](mailto:rutten@idhtrade.org). The Consultant is thus explicitly prohibited, to prevent discrimination of the other Consultants and to ensure the diligence of the procedure, to have any contact whatsoever regarding the tender with any other persons of IDH than the person stated in the first sentence of this paragraph.

The documents provided by or on behalf of IDH will be handled with confidentiality. The Consultant will also impose a duty of confidentiality on any parties that it engages. Any breach of the duty of confidentiality by the Consultant or its engaged third parties will give IDH grounds for exclusion of the Consultant, without requiring any prior written or verbal warning. All information, documents and other requested or provided data submitted by the Consultants will be handled with due care and confidentiality by IDH. The provided information will after evaluation by IDH be filed as confidential. The provided information will not be returned to the Consultant.

## 5. Disclaimer

IDH reserves the right to update, change, extend, postpone, withdraw or suspend the Terms of Reference, this tender, or any decision regarding the selection or contract award. IDH is not obliged in this tender procedure to make a contract award decision or to conclude a contract with a participant. IDH reserves the right to suspend or annul the Tender Procedure at any moment in time.

Participants cannot claim compensation from IDH, any affiliated persons or entities, in any way, in case any of the afore-mentioned situations occur.

By handing in a proposal, participants accept all terms and reservations made in these Terms of Reference, and subsequent information and documentation in this tender procedure.

## 6. Contact Information

### **Guido Rutten**

Manager, Verified Sourcing Areas

[rutten@idhtrade.org](mailto:rutten@idhtrade.org)