

Terms of Reference

Monitoring & Evaluation Consultancy Pool Under Framework Agreement

May 12, 2021

1. Introduction

IDH, The Sustainable Trade Initiative (hereafter “IDH”), accelerates and up-scales sustainable trade by building impact-oriented coalitions of front running companies, civil society, governments, knowledge institutions, and other stakeholders in several commodity sectors. We convene the interests, strengths and knowledge of public and private partners in sustainability commodity programs that aim to mainstream international and domestic commodity markets. We jointly formulate strategic intervention plans with public and private partners and we co-invest with partners in activities that generate public goods.

On basis of these Terms of Reference, IDH aims to select multiple parties to provide consultancy services, when called for. The service is to address the Monitoring, Evaluation and Learning (MEL) needs of programs at IDH: IDH works increasingly through innovative approaches that require vigorous research in its design. To prove the effectiveness of these approaches against conventional approaches is the reason why we are looking for a pool of external consultants (“Consultancy Pool”) to support the delivery of MEL products. For a detailed description of the assignment, please refer to sections 2 and 3 below.

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 any subsequent information and documentation in this tender procedure.

2. Objectives

The overall objective of this assignment is to support the MEL products at IDH, ensuring that high-level quality tools and frameworks are developed and implemented; meaningful and verifiable data is collected for the monitoring, evaluation, and learning needs of programs and projects.

The specific objectives below describe the overall scope of work for possible assignments under the MEL Consultancy Pool. The overall scope of work below only serves as “umbrella” of future, possible assignments that will be brought to the MEL Consultancy Pool.

Candidates are expected to touch on one or more of the relevant sub-categories included in the Consultancy Pool:

- Capacity building on M&E topics
- MEL framework development, development and/or reconstruction of a Theory of Change or Logic Framework, operationalization of indicator frameworks by developing MEL plans/systems or data collection methods and tools, and Revising or improving indicator measurement guidance, methodologies, data collection tools, based on solid academic and sector knowledge and on program/project strategy and needs
- Evaluations and development of measurement frameworks and MEL systems, including indicator lists, guidance protocols, methodologies, and data management systems, and developing pragmatic approaches for the reconstruction of baselines or midlines for projects
- Remote sensing, GIS data collection and analysis:
- GHG emissions measurement and modelling:

Deliverables

The deliverables of the assignment could include one or more of the following, depending on the type of assignment brought to the MEL Consultancy Pool. The list below describes the overall scope of work that is inclusive of all future assignments. The deadlines for these assignments are dependent on the nature of the assignment and the project timeline the assignment is associated with.

Deliverables of assignment (by Consultancy Pool Sub-Categories)	
1	Capacity building on M&E topics
2	MEL framework development
	A business unit, program, or project Theory of Change/Logic Framework
	Program/project measurement framework/MEL system
	Indicator development and definitions
	MEL plan/system for programs/projects
	Improved indicator measurement guidance document
	Program research agenda and learning priorities
3	Evaluations
	Evaluation framework for a program/project, that includes sampling strategy and methods, data collection tools and management system to extract insights from implementation
	Indicator data collection methodology (sampling, tier-based strategy)
	Baseline or midline reconstruction methodology for a program/project
	(Digital) Tools for data collection
4	Remote sensing, GIS data collection and analysis
5	GHG emissions measurement and modelling

3. Consultant profile

The consultant(s) need(s) to have the following knowledge and experience:

- Demonstrated experience (minimum 7 years) developing more than one of objectives described in section 2;
- Demonstrated experience in client-facing research advisory roles;
- Demonstrated knowledge and skills in methodology development, data analysis, and data management, both quantitative and qualitative;
- Strong understanding of agricultural value chains, deforestation-free production, market transformation, sustainability governance, smallholder farming systems, and public and private sector engagement in sustainability programs;
- Demonstrated experience in effective, quantitative and qualitative data collection at farm level, and from public and private sector stakeholders.

The consultant(s) need(s) to have the following skills:

- Good interpersonal and communication skills;
- Solid skills in research and methodology design;
- Advanced strategic thinking and analytical skills.

The consultant(s) need(s) to have the following characteristics:

- Be able to promptly respond to calls for proposals (within 5 business days);
- Be able to accommodate short turnaround time (varies depends on the nature of the assignment, typically between 1-4 weeks);
- Be able to analyse evidence gaps and learning needs of programs/projects and provide advises and suggestions independently of the requests;
- Be able to persuade and convince stakeholders.

4. Procedure

The assignment will be awarded to consultants that can deliver the highest quality in MEL tools with short-term notice at a reasonable rate. This is determined based on the evaluation criteria of price and quality of services described in section 8. The procedure will be as follows:

1. Joining the Consultancy Pool

- Open call for proposals is published on IDH’s website and social media. Any questions can be directed to the contact details (section 8);
- Assessment of proposals by an evaluation committee consisting of program managers and internal MEL staff based on criteria described in section 4 “consultant profile” and in section 8;
- IDH invites candidates with the best proposals for an online pitching session with the evaluation committee;
- The committee makes a decision on the consultants/consultancy/companies to be included in the MEL Consultancy Pool under a Framework Agreement. The Consultancy Pool will be divided into sub-groups based on the activities that may be covered. The relevant subgroups include
 - Capacity building on M&E topics

- MEL Framework development
- Evaluations
- Remote sensing, GIS data collection and analysis
- GHG emissions measurement and modelling
- Inception meeting with the selected consultants/consultancy/companies for the signing of a Framework Agreement;

Tender process	Timeline
Terms of Reference published	12/05/2021
Deadline for submission of proposals*	12/06/2021
The most fitting proposals are invited to a pitching session for evaluation committee	30/06/2021
Selection of consultancy	07/07/2021
Awarding of contract to successful consultant(s) or consultancy	14/07/2021

*Proposals submitted after the deadline will be returned and will not be considered in the tender procedure.

IDH will reject offers if any illegal or corrupt practices have taken place in connection with the award or the tender procedure.

2. Awarding of Consultancy assignments

Upon selection into the framework and signing of the contract, IDH will cluster the consultants of the framework into sub-groups of topical interest, based on area of specialties exhibited in the application process through proposals and interviews. This sub-groups are created for convenience of selection of future assignments, which means that organizations that belong to certain sub-groups will be approached first for assignments related to that particularly topical area.

Upon releasing each assignment, based on the nature of the assignment, IDH will firstly formulate the description, scope of services needed, purpose thereof, a timeline/deadline, a maximum budget and send this via email to the pre-selected parties ("**Sub-group Consultants**"). IDH will not publicized the assignment in an open Term of Reference to all participating consultants but will only approach Sub-group Consultants that are considered as best suitable according to the clustering above. The parties that are not listed against the particular topical areas of interests will only be approached if Sub-group Consultants are not able to accommodate the assignment.

In response to the request, the Sub-group Consultants will send a proposal to IDH within 7 days of receipt of the email request for specific services. The proposal will include a proposition of the execution of the assignment and a budget. The proposal should demonstrate the consultant profile terms set out in section 4 of this Framework Agreement. IDH guarantees an equal playing field is always ensured during the terms of this Framework Agreement. Parties may choose not to compete in the competition in case of unavailability.

After Sub-group Consultants submitted their proposals, IDH will award the assignment to the Sub-group Consultants with the most economically advantageous proposal according to the applicability of the proposal to the assignment needs and the best price-quality ratio with regards to the description of Services.

IDH will inform the Sub-group Consultants on its decision to award the assignment to the party that is awarded with the assignment (“**Awarded Party**”) via email. All Parties that were approached will be informed in writing per email.

In case IDH and the Awarded Party do not reach agreement on the specific terms after notice of award and before entering into a specific agreement, the assignment will be assigned to the Sub-group Consultant with the second-best proposal.

5. Proposal guidelines

IDH is requesting the consultants to hand in a proposal of maximum 10 pages (excluding CVs, sample work, and references). The proposal must be handed in PDF-format to rose@idhtrade.org before or on **June 15, 2021**.

In the proposal, please provide the following:

- A succinct, well-documented approach detailing your way of working related to the specific objectives outlined in section 2;
- Clear description of the proposed team, their relevant experience related to the specific objectives outlined in section 2;
- A rate in Euros (ex VAT) with a break-down of man days/rate per team member;
- The CVs of the team member(s), highlighting the academic and professional experiences that makes them fit for this consultancy pool;
- Sample work (1 to 3) of each of the proposed team members, relevant to any of the specific objectives outlined in section 2. And references that can abide to the services provided in the sample work and its quality;
- A statement acknowledging that the Grounds for exclusion terms (see the *two* points below) do not apply to your company/organization or any of the proposed team members.

6. Grounds for exclusion

- Consultants shall be excluded from participation in a procurement procedure if:
 - They are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
 - They or persons having powers of representation, decision-making or control over them have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;

- They have been guilty of grave professional misconduct proven by any means which the IDH can justify;
- They have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established, or with those of the Netherlands or those of the country where the contract is to be performed;
- They or persons having powers of representation, decision making or control over them have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization, money laundering or any other illegal activity, where such illegal activity is detrimental to the Ministry of Foreign Affairs financial interests.

Consultants must confirm in writing that they are not in one of the situations as listed above.

- Consultants shall not make use of child labor or forced labor and/or practice discrimination and they shall respect the right to freedom of association and the right to organize and engage in collective bargaining, in accordance with the core conventions of the International Labor Organization (ILO).

7. Proposal Assessment Approach

The proposals will be assessed based on the following criteria:

Component		Criteria
1	Team composition	The proposed team has the experience, skills, and availability to meaningfully address the MEL needs (outlined in section 2). Proposal contains a clear mapping of the skills of each proposed team member against the objectives outlined in section 2 and this mapping is supported by the individual experience of the team members as outlined in their CV and sample work.
2	Demonstrated experience	The professional experience and the sample work meet quality standards of conventional MEL deliverables. The team demonstrates advanced experience and outstanding skills to handle complexity of possible assignments. The latter item will also be assessed during the pitch and through a reference check.
3	Design and Development process	The proposal demonstrates a solid understanding of the MEL's needs as described in section 2 and a pragmatic approach on how the consultant team would address them. The process of engagement with a consultancy/organisation for an assignment will be lean and streamlined: contracting assignments to the consultancy/organisation does not entail time from a team of 3 of 4 additional roles that do not directly contribute content to the assignment.

		<p>There are clear roles and responsibilities in the team proposed by the consultancy.</p> <p>During the pitch session, the consultant can propose a solid and practical approach to address the MEL situation/needs presented to them.</p>
4	Availability (capacity to be available on short notice)	<p>The extent to which the approach in the proposal gives sufficient guarantee that the members of the proposed team will be in a position to respond to requests within the short timeframes we define in the terms of reference: 5 days to reply regarding an assignment request; assignments run for 1-4 weeks.</p>
5	Budget	<p>The extent to which budget is reasonable and its commensurable with the quality of services offered.</p>

Scoring for each component

The evaluation committee composed by the MEL team at IDH will score each component by assigning scores from 1 to 5, with 5 representing optimal performance on the component and 1 representing poor performance on the respective component. Based on the scores and internal discussions on the strengths of the proposals and the team members, the committee will invite a selection of eligible candidates to the pitch meeting. After the pitch meeting, the committee will decide which proposals will be offered the framework agreement for IDH’s MEL Consultancy Pool which will be valid for one year.

8. 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 rose@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.

9. Contact information

Name: Madison Rose
 Position: M&E Advisor



Email: rose@idhtrade.org

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