

Terms of Reference

IDH Organizational Vision and Strategy

1. Introduction

IDH aims to transform markets by convening, co-creating, and co-financing inclusive and sustainable market-driven solutions that create value for people and planet. We leverage the power of markets to create better jobs, better incomes and better environment, with gender equality for all. Across 12 sectors and 20+ producing and manufacturing landscapes we work together in multi-stakeholder partnerships to drive improvements in sector governance and business practices through the design, testing and adoption of innovative and proven business cases to achieve lasting systemic changes at scale.

Since IDH's foundation in 2008, we have grown from a Dutch (funded) initiative to a truly global organization with an international workforce (of 55 nationalities with a staff count of 360), a large portfolio across key regions (Sub-Saharan Africa, South-East Asia, South America) that is funded by multiple government and large private foundations (Dutch, Swiss, Danish, Belgian and Norwegian governments, Mastercard Foundation and IKEA Foundation to name a few). Over the past 15 years we have developed, tested, financed and scaled many innovative sustainability approaches to drive market transformations.

The multitude of crises such as climate crises, biodiversity crises and large increase in inequality shows that lasting and systemic changes in global trade are more important than ever. To ensure we continue and accelerate our positive impact on people and planet we are setting out to redefine our vision for the future and develop a new organizational strategy to guide our next funding cycle (2026-2030) and beyond.

On the basis of these Terms of Reference ("ToR") IDH aims to select a party that supports IDH in the design and implementation of a process to engage internal and external stakeholders and collect the necessary findings to enable the development and writing of the new organizational vision and strategy by a core internal IDH team. The ToR provides more information about the assignment, the expected activities and deliverables and timelines for completion.

2. The assignment

The objective of this assignment is to support IDH in the development of an organizational vision and strategy that guides IDH's next institutional funding cycle (2026-2030) and beyond. This support covers the design and facilitation of the strategy process, lead research and

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collection of findings in **close collaboration with a core team at IDH, who is end-responsible for the development of the vision and strategy documents.**

The **envisioned outcomes** of this process are:

- A clear vision and strategy that ensures that IDH is future-proof, and our approaches are fit for purpose to ensure IDHs' long-term relevance and help accelerate IDH's impact.
- Broad ownership by the organization and key stakeholders/donors of the new vision and strategy.
- Clear direction and guidelines on what needs to be considered for the writing of IDHs next multi-year plan, which will start after finalizing the vision and strategy in Q4 of 2023.

We envision that the final document needs to answer **following questions**:

- "Where do we want to go (where not)" - Vision
- "What will we have achieved" - Organizational goals
- "Where do we play (and where not)" – Our role in key transitions
- "Who will we work/partner with (who not) and how" – Key partners and donors
- "How do we do it" - Approach towards programs, investment and solutions
- "Where will we make it happen (and where not)"- Selection criteria
- "What will we need to make it work"– high-level indication on funding, governance, organizational set-up, people, ops/data/IT

Our timelines are ambitious (see details section 3 of the TOR), therefore we envision a three-pronged approach that covers the following aspects:

- **The bigger picture:** Where is the world moving? Which global trends will be significant for our work within the next decade? What action will be needed to create lasting, systemic change? What is coming after the SDGs?
- **A vision for IDH (ours and others):** What are our impact ambitions? Where do we see IDH in the future? What do our key partner see for us? How do we merge these different visions into a vision for IDH?
- **Leveraging our experience and network:** What has IDH been doing in the past? What are we particularly good at and what not? What are others doing? And how do we differ? What is missing? How can we leverage others? Who should we partner with?

For each aspect, we **expect that following activities are led and facilitated by the consultants**. Stakeholder consultations should take place on needs basis and should be combined where possible to shed light on each of the 3 aspects. For internal consultations we can think about workshop set-ups to encourage exchanging of views and ensure further buy-in from the consulted teams, combined with sufficient feedback rounds once the draft vision and strategy texts have been developed by the IDH core team.



- **The bigger picture:** Desk review of information (possibly complemented by external consultations) on the work broader field of work incl. e.g. current and future evolutions of global trade, international development policy and trends, sustainability of markets and supply chains.
- **A vision for IDH:** Based on internal and external consultations of IDHs leadership, broader organization-wide engagement and subject matter experts. We envision around 5-7 Internal (leadership) consultations (either group based or 1-1) and 10-15 consultations with subject matter experts (either group based or 1-1). The exact format of number of consultations should be proposed by the consultant and agreed upon with IDH at inception.
- **Leveraging our experience and network (including a stakeholder and partnership analysis),** guided by the review of IDH materials and policies such as:
 - Vision 2030
 - Multi-Year Plan 2021-2025
 - Multi-Year Plan 2016-2020
 - Past Corporate evaluations & management responses
 - Annual Reporting/Annual Planning documents
 - Partnership strategy
 - Corporate and Business Unit theory of change
 - IDH system change framework
 - IDH Communication Strategy

Since we have built a global team of many nationalities, backgrounds and perspectives, we believe it is important to develop a strategy that is owned by IDH's leadership teams across the globe, it should reflect **the One IDH vision**.

3. Deliverables

The written deliverables of this assignment will be:

- Detailed workplan to sign off on approach and deadlines (max 5 pages)
- Findings report on the bigger picture (max 30 pages)
- Findings report on IDH vision (max 10 pages)
- Findings report on experience and network (max 15 pages)
- Global stakeholder and partnerships analysis (max 10 pages)
- Findings report on IDH strategy (max 15 pages, excluding possible annex)

For the successful completion of this assignment, guidelines for the final deliverables will be agreed upon with IDH at inception of this project. The exact timelines for the deliverables and sub-items may be subject to change and will be agreed on with IDH and the consultant upon the approval of the detailed workplan.



Deliverable	Deadline
Detailed workplan to sign off approach and deadlines (max 5 pages)	9 June 2023
Bigger picture findings report (max 30 pages):	15 July 2023
Findings report on experience and network (max 15 pages):	31 August 2023
Draft partnership and broader stakeholder analysis (max 10 pages)	30 June 2023
Supervisory Board Meetings/Global Leadership Team/Regional/country office workshops/expert/stakeholder interviews (dates tbc in concertation with IDH core team)	Mid-June - October 2023
Final partnership and broader stakeholder analysis (max 10 pages)	10 October 2023
Findings report on IDH vision (max 10 pages): Prepare, conduct and draw conclusions from external partners, internal and external stakeholder and expert interviews/sessions	10 October 2023
Findings report on IDH strategy (max 15 pages): Prepare, facilitate and formulate conclusions via GLT/SB/regional workshops	September and November 2023, conclusions ready by 10 October
Preparation and facilitation of a strategic partner and donor session around the refined vision and strategy texts in the runup to a final Supervisory Board confirmation end of November	By 1 November 2023 – taking place on 14, 15 or 16 November in Switzerland

4. Consultant(s) profile

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

- Long-term vision and strategy design in complex, uncertain, ambiguous settings
- Systems-thinking, transitions pathways design, complexity theory



- Proven experience in leading co-creative and participatory processes, strong conceptual thinker, able to break down complexity, able to quickly learn about IDH's context, transferable knowledge from similar sectors/organizations.
- Track record of similar assignments and knowledge of sustainability, agricultural trade, market systems, landscape approaches that are relevant for this assignment.

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

- Punctual, dedicated adherence to deadlines.
- Analytical and result oriented.
- Critical on quality & reliability of information.
- Sensitivity how to treat confidential information.
- Ability to effectively communicate with staff around the globe at all levels of seniority.
- Excellent written and spoken English, culturally sensitive, analytical.

5. Selection Procedure

The procedure will be as follows:

1. Publishing the tender and inviting suitable consultants to submit a proposal based on this ToR.
2. Evaluation of the proposals by the evaluation committee, which will be composed of three members of the internal IDH core team and the evaluation committee is chaired by the CEO of IDH. The 3 proposals that receive the highest scores will be presented to the evaluation committee. The chair of the evaluation committee and the evaluation committee will evaluate the proposals individually based on the selection criteria as published in this ToR.
3. Decision on selection of the consultant.
4. Inception meeting with the selected consultant.

The schedule below indicates the timelines for the tender procedure:

Tender process	Timeline
ToR published	14 th of April, 2023
Deadline questions relating to tender	21 st of April, 2023
Answers will be sent on	28 th of April, 2023
Deadline for submission of proposals*	5 th of May, 2023
Presentation of top 3 proposals	Pre-set timeslots available:



	15 th of May, 2023, 10-11 am CEST 17 th of May, 2023, 9-10 am CEST 17 th of May, 2023, 1-2 pm CEST
Selection of Consultant	22 th of May, 2023
Start of assignment	1 st of June, 2023

* Proposals submitted after the deadline will be returned and will not be considered in the tender procedure. After the deadline to submit a proposal has passed, the evaluation committee will evaluate the proposals.

The proposals will first be tested for completeness:

- The absence of the documents referred to in Section 6 of this document can lead to exclusion from further participation in the tender procedure. This is also the case when minimum requirements listed in this ToR are not met.
- If the proposal is complete, the evaluation committee will evaluate the proposal based on the criteria as mentioned in section 6.

The assignment will be awarded to the consultant with the most economically advantageous tender. This is determined based on the evaluation criteria price (30%) and quality (70%).

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

6. Proposal requirements

IDH is requesting the consultants to hand in a proposal of maximum 10 pages (excluding company biographies, CVs, sample work and references). The proposal must be handed in a MS Word or PowerPoint version next to a PDF submission to facilitate any copy-and-pasting of content that we may need during evaluation.

The proposal must at least include:

Content:

- a) A succinct, well-documented approach addressing the requirements set out this ToR. We request that the proposal structure matches the selection criteria as closely as possible.
- b) Maximum of three client references and a sample of previous work relevant to the deliverables in this ToR.



- c) An overview of the project team, including the CVs of the project team members reflecting all criteria mentioned below in the evaluation criteria under “track-record”..
- d) Budget presented in Euros (excluding and including VAT) of maximum 100.000 € incl. VAT and inclusive of all travel and other expenses with a break-down of days/rate per project team member.
- e) Statement on Ground for exclusion (see section 7 below)

Administrative:

- f) Completed detail request form (annex 1).
- g) Copy of most recent (audited) financial accounts.
- h) Statement of acceptance draft contract (annex 4)
- i) Question form template (annex 5)

The proposal must be submitted to Heidrun Kollenda at kollenda@idhtrade.org before May 5th at 6pm.

7. Proposal assessment (testing and weighing)

The assignment will be awarded to the consultant with the most economically advantageous tender. The most economically advantageous tender is determined on the basis of the evaluation criteria of price and quality.

Grounds for exclusion

1. Consultants shall be excluded from participation in this tender procedure if:
 - j) 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;
 - k) 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;
 - l) they have been guilty of grave professional misconduct proven by any means which the IDH can justify;
 - m) 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;
 - n) 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.



- o) Consultants must confirm in writing that they are not in one of the situations as listed above.
2. 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).

Scoring and weighing

The evaluation criteria are compared and weighed according to the procedure below. This concerns a general outline of the scoring methodology and an explanation of how the consultant can demonstrate compliance with the requirements.

Step 1 - Criterion Quality

Evaluation scores will be awarded for each of the components. The evaluation committee will score each component unanimously.

The proposal will be assessed based on the following selection criteria:

Component		Criteria	Max. Grading
1	Proposal	<p>The extent to which the proposal meets the required quality of services, based on the requirements in Section 6 above using the following criteria:</p> <ul style="list-style-type: none">• The proposal is clear in terms of objectives and approach• The proposed approach and work plan are appropriate to achieve the expected results• Appropriate tools and methods for the assignment are proposed• The proposal is realistic in its approach and objectives• The proposed budget is clear, realistic, and affordable• The proposed timelines are realistic• The proposal takes sufficient account of the expected challenges	50



2	Track record	<p>The extent to which the consultant presents the required level of expertise and knowledge, based on the requirements in Section 6:</p> <ul style="list-style-type: none">• The candidate understands the expected results of this assignment• The candidate is independent and recognized as credible• The candidate has proven knowledge and experience in conducting similar work and carried out a similar assignment within the last three years• The candidate proposes a strong team composition incl. project lead to complete this assignment	20
3	Budget	Best price for the proposed level of quality as described in the ToR.	30

The evaluation committee will unanimously score each component by assigning scores based on the maximum grading per component 1 and 2. The budget scoring will be determined in step 2.

Step 2 - Criterion Price

A combined price in Euros (ex VAT and incl. VAT) is to be presented, with a maximum of 100.000 € (inc. VAT) for the entire assignment, inclusive of all travel and other expenses.

This is to be broken down by team member rate and hours, including a blended rate. The criterion budget is assessed as following:

For each budget the lowest price (based on the blended day rate) will receive 35 points. All others will receive points relative to the lowest offer (e.g. Offer A: 10k ; Offer B: 12k, Offer C: 14k. Offer A receives 30 points; Offer B receives $(10/12) \cdot 30 = 25$ points; Offer C receives $(10/14) \cdot 30 = 21,4$ points). All scores will be rounded to the first decimal point.

Given the not-for-profit nature of the IDH activities, we encourage consultants to clearly mention if the budget might be positively impacted by partial pro bono work or reduced rate as a contribution to the successful delivery of the assignment.

Step 3 - Weighting

The final score will be weighted based on a 50% scoring for the overall quality of the proposal, 20% for the track record of the team and 30% on price.



If scores of consultants are equal, priority will be based on the total scores that were given for the Criterion Quality (Proposal and track record combined). The assignment will be awarded to the consultant with the highest score for the Criterion Quality. If the evaluation of the Criterion Quality does not lead to a distinction, the score for the component “Proposal overall” will be decisive. If this does not lead to a distinction, the ranking will be determined by the drawing of lots.

Award

Once IDH has decided to which consultant it intends to award the assignment, a written notification thereof is sent to all Interested Parties that participated in the tender procedure.

The Consultant is contracted via a letter of assignment, following IDH’s template (Annex 2).

8. Communication and 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 Heidrun Kollenda via Kollenda@idhtrade.org. The consultant is prohibited, to prevent discrimination of the other consultants and to ensure the level-playing field in 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 confidential. 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 to third parties will give IDH grounds for exclusion of the consultant, without required 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. Disclaimer

IDH reserves the right to update, change, extend, postpone, withdraw, or suspend the ToR, this tender procedure, 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.

Participants in the tender procedure 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 this ToR, and subsequent information and documentation in this tender procedure.



10. Annexes

Annex 1: Detail request form

Annex 2: IDH Letter of Assignment Template

Annex 3: IDH General Terms and Conditions for Services

Annex 4: Statement of acceptance draft contract

Annex 5: Question form template