

## **Terms of Reference for the Procurement of Consultancy Services**

**Project Manager** to coordinate training and research for a coffee transparency program, conducted by the Committee on Sustainability Assessment (COSA)

### **1. Project name. Transparency at Origin**

### **2. Context and Key objectives of the role**

The goal of this work is to support efforts to advance data capacity and transparency so as to improve learning in the coffee sector and better inform policy to strengthen coffee-based livelihoods.

The ICO's Technical Work Stream on Transparency identified two main areas as necessary data priorities: a common cross-country understanding of the actual costs of production and the relative efficiency of value transmission understood as the differential value points that occur between farm-gate price and the FOB price.

COSA and partners will develop these areas focusing on

1. Determining the optimal metrics and methodologies to ensure rigorous data and consistency or comparability across countries and conditions.
2. Capacity building in close collaboration with national coffee institutions. By strengthening the national capacity we believe that the producers and their organizations, including cooperatives, will better understand their levels of efficiency in the two most significant aspects: their costs of production and the post-harvest factors affecting their price. This is especially true for smaller farmers that have less access to information.
3. Using science-based data and analytics as well as establishing the necessary data architecture to ensure the data can be widely used as a public good. Sectoral organizations and policymakers can then target investments more appropriately to improve production costs and to increase post-harvest efficiencies across the sector. Together, these are the most likely interventions that could improve farmer livelihoods in a lasting manner and independent of external factors.

This integrated approach will innovatively establish new and valuable areas of transparency in the coffee sector providing science-based data that is credible and can be gathered at low-cost with new technologies. The Project's overall objective is defined by the following milestones:

1. Establishing all the necessary optimal practices within a collaborative process: Determine the optimal indicators, define metrologies, and establish both the protocols for the work and the analytic methods to be used.
2. Aligning technologies to facilitate the objectives: Put in place appropriate technologies to facilitate the objectives and to ensure adequate data privacy and security. This includes establishing the data architecture, database, and data gathering tools as well as a start to assessing the likely design of dashboards and data visualizations that different users will need to take full advantage of the transformation of data to knowledge.
3. Building local capacity and piloting the work to ensure that an origin has the institutional capacity to properly gather, analyze, and secure good data.

4. Consolidating and writing up the training guidelines and protocols that build on successful work in these pilot producer countries so as to provide a scaling to other places of that ability of institutions and personnel to competently conduct the fieldwork.

5. Analysis and Review: Application of the analytic protocols and process the data in close collaboration with the institutions. Proposal of specific visualizations to help transform the data into useful knowledge. This includes distinctions such as how factors such as gender, age, farm size, etc. affect results.

6. Sharing and Dissemination: The aggregated data is intended to benefit a broad range of actors across the sector. It will be made available fairly and without cost to support small farmers and their organizations by several other ICO-related programs as part of their work.

Two pilot studies will be conducted (Africa, Latin America) with the eventual goal to scale to all countries interested in such work. The new data gathered for these transparency efforts will not only benefit the farming communities of the target countries but will also critically inform and facilitate the work of several other ICO Technical Work Streams: the Living and Prosperous Income group, the Resilient Landscapes group, and the Policy group to whom we will provide valuable data to advance all of their individual efforts toward greater collective impact.

### 3. Responsibilities, Tasks, and Deliverables

The Project Manager will guide the preparation and smooth execution of this project, leading coordination with staff, consultants, and national institutions to ensure on-time delivery of the work. The work requires diplomatic capabilities and strong attention to relationship management and serving as a bridge between the COSA team developing the systems, tools, and technology; the research team and national partner institutions conducting the field studies, the Technical Advisory Committee, and the ICO Technical Work Stream, so as to ensure a good outcome, from start to conclusion, and to ensure that lessons learned are captured and professionally written up as guides for knowledge management.

As a general guideline, the project manager's responsibilities will include the following:

1. **Partner Management.** Ensure continual, open, and mutual dialog between all referenced partners that facilitates the efficient and collegial management of the project. Be aware of changes over the course of the project that might require adapting plans, and ensure that any and all potential changes are addressed proactively in a timely manner with all partners. Coordinate meetings.
2. **Resource Management.** Manage the approved budget for national partners (sub-awardees), reviewing weekly and monthly objectives (completion of tasks, and time allocation and tracking by COSA staff and consultants). Identify resource needs in a timely manner so as not to cause the work to be delayed. Regularly assess workflow needs. Actively manage project deadlines and budgets.
3. **Content Management.** Coordinate the timely development and adaptation of COSA sustainability tools between staff experts (e.g., indicators, survey methods), national partners, and the ICO team.
4. **Project implementation.** Ensure that field research is carried out according to the established timetable, working where necessary with research, measurement systems, technology teams, and national institutions. Sense-check implementation plans, looking for efficiencies, e.g. in logistics or timing. Ensure that the practical prerequisites for a

successful project are in place, such as testing the technology (i.e. tablets, survey technology) for data gathering, and language adaptation needs.

5. **Training.** Ensure that local implementing partners from the national institutions receive knowledge and training - to be imparted by the research team - consistent with the project's goals. Capture any context-specific lessons that can serve to guide future field research in other locations.
6. **Systematic tracking of deliverables.** With project management software, ensure timely and accurate status tracking.
7. **Review & learn.** Lead periodic, and final, evaluation reviews of the overall project process and recommend potential changes to procedures.

**Deliverables:**

1. Establishment of the overall workplan in collaboration with project team, down to the sub-task level, with clear deadlines and assigned responsibilities.
2. At a minimum weekly, and at times daily, update project tasks and sub-tasks using COSA's project management software (currently Monday.com), ensuring that all project staff are also updating progress daily.
3. Weekly reporting on key project deliverables, communicated clearly and where necessary in writing to all relevant parties. Participate in weekly project review meetings (Client-Projects-Deliverables calls as well as Project Team meetings.)
4. Monthly narrative reports to COSA. These will include notation of any project variances (resources) vs budget and the reasons for these. Contribute to the quarterly reporting to the funder (GIZ).

<b>Milestones that Project Manager is responsible to ensure take place as planned</b>	<b>Due dates</b>
Workplan established	January 29, 2022
Data Model & Measurement Framework	April 1, 2022
Data System (Technology)	May, 2022
Training complete, Data collect begins	June, 2022
Data collection completed	October, 2022
Analytics complete; validation with Stakeholders	January, 2023
Presentation of Pilot Results	March, 2023

#### 4. Background experience and requirements:

1. **10+ years relevant work experience** in a similar consultancy role coordinating sustainability research projects in the Latin American and African coffee sectors.
2. **Demonstrable understanding** of COSA or similar transparent data methods and tools, and experience coordinating implementations of those.
3. **Flexibility in the timing of hours** worked, as the work cannot be done exclusively on a set time schedule. Must be willing to be on call and available on short notice to address project needs throughout the project period of January 2022 through July 2023
4. The position also requires great **professional flexibility** to encompass the needs of different project team members and stakeholders, working toward unity of purpose.
5. **Highly organized**, able to comfortably track and frequently report on objectives, budget resources, and staff hours.
6. **Cross- cultural sensitivity**, able to coordinate people of different educations, skill levels, and backgrounds.
7. Experience in **managing training** processes across multiple countries.
8. **Fluency in English** (native or professional level) and either Spanish (Latin America) or Kiswahili.
9. **Excellent verbal and written communication skills** to convey information and needs accurately and clearly
10. **Experience working in a tech-forward environment** with advanced virtual technologies and observance of good network security practices

5. **Period of assignment:** from January 15, 2022 to July 1, 2023.

6. **Location:** Contractor's own location. Excellent internet connectivity required. Must be available for phone and email communication regularly and during COSA business hours (ca. 8am-5pm) East Coast USA time zone.)

#### 7. Submission of proposal:

##### **Applications must include the following:**

1. An offer letter - no more than 3 pages – containing a narrative proposal of consultant's experience in project management as it relates directly to the objectives of the consultancy, specifying the tools the consultant is most experienced in, and the specific relevant projects managed (preferably in the coffee sector).
2. CV of qualifications; should include past sustainability research you managed in the coffee sector, specifying the types of metrics, tools, and methodologies applied.
3. Professional References (up to 3) if you do not have a recent work history with COSA or its partners
4. Your guaranteed availability for working (which days and times of day in ET USA equivalent)

5. Include your daily rate (USD) for this work<sup>1</sup>
6. Please specify city/country of current residence (and nationality if different)

**Costing and Process Requirements:**

1. The structure of the bid must encompass and correspond to the structure of the Item #3 “Responsibilities, Tasks, and Deliverables”, must be drafted in English, and comprise no more than 1-3 pages.
2. We estimate a typical workload of ca. 102 expert days (816 hours) for a qualified professional to provide the services over the course of the contract. The offer must be costed on this basis.
3. We will provide adequate travel and expenses when necessary. Travel is in economy class.
4. Proposed bid must be submitted via e-mail to: “[Careers@thecosa.org](mailto:Careers@thecosa.org)”. Only successful proposals will be informed and invited to review the offer.
5. Deadline for submission of proposal **has been extended to Monday, January 17, 2022 – 5 pm ET (New York).**

Incomplete proposals and proposals or any additional information received after the submission time and date are subject to rejection.

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<sup>1</sup> In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets. The number of days/travel/workshops and the budget amount shall be agreed in the contract as ‘up to’ amounts. The specifications for pricing are defined in the price schedule.