Development of Coconut Sustainability Information Platform (C-SIP)

August 2024

Background

The Sustainable Coconut Partnership (SCP) is an international, multi-stakeholder, voluntary membership organisation, with a mission to work towards a responsible and resilient coconut sector. As an initiative stemming from the transparency and traceability working group, the Sustainable Coconut Partnership is commissioning the design of a Coconut Sustainability Information Platform (C-SIP) to be used by industry members and supply chain partners.

Through this assignment, the service provider will design the platform. Following design, it is envisaged that the service provider will continue to operate the platform in a software as a service (SAAS) model. The service provider would also continue to develop the platform in coordination with the Sustainable Coconut Partnership. In the first year, it is envisaged that up to 25 members and their suppliers would be the users of the platform. This is likely to grow significantly over the coming years.

Objectives and scope

The overall objective of the Coconut Sustainability Information Platform is to develop a dedicated and exclusive white labelled Software as a Service (SAAS) which will:
- Ensure that sustainability information shared between supply chain partners is aligned with the industry sustainability reference: the Sustainable Coconut Charter
- Streamline communication of sustainability information across partners in the coconut supply chain, by enabling key players to efficiently share aligned sustainability information to multiple supply chain partners. This should significantly reduce the burden created by manual reporting in multiple templates and tools to different partners.
- Ensure data security and privacy is maintained, and that selected third parties can be granted access

The supply chain partners which the platform will share information between include:
- Primary processors for key coconut products: oil, sugar, desiccated, milk, charcoal, etc
- Refineries of coconut oil
- Traders
- Intermediate manufacturers
- Brands

These supply chain partners may use the platform to either report information or to access information shared by other users (provided that they have relevant access permissions).

Types of sustainability information and documents which will be shared through the platform include 45 declarative reporting points based on the 9 supply chain principles and ambitions of the Sustainable coconut Charter (to be filled either in text or with attachment). These include:

- Sustainability policy commitments
- Sustainability governance (including staff responsibilities)
- Risk assessments
- Supply chain engagement plan (process, activities, identification and management of supplier non-compliances, grievance procedures)
- Commercial terms and buying practices linked to sustainability
- Participation in collaborative sustainability initiatives (beyond supply chain)
- Progress and performance tracking on key metrics
- Verification practices
- Disclosure and reporting
- Claims
- Aggregated declarative traceability reporting, (for example % traceability to mill)

Detailed data on traceability of shipments is out of scope for this version. For further detail about the reporting points for this version, please see the table below.

PRINCIPLE	TOPICS	POINTS OF ATTENTION
1.1. Developing policies and commitments in line with the core expectations of the sustainable coconut charter	Commitment	A written commitment declaring commitment to the implementation and continuous improvement in line with the Sustainable Coconut Charter is available.
	Training	The Organization has trained personnels to implement the supply chain requirements
1.2. Developing adequate sustainability governance structure	Management structure	The Organization has a clear management structure on the responsibilities, procedures and documentation for implementing the supply chain requirements.
	Continuous Improvement Plan	Continuous improvement is strategically planned to consider the vision, goals, and objectives of the organization.
2.1. Mapping for supply chain compliance	Supply Chain Mapping	A visualization of the flow of supplies and its control and management through the supply chain is documented.
2.2 Traceability	External traceability	The organization is able to verify that the sourced product comes from SCP verified sources.
2.3. Practicing risk assessment and due diligence	Risk assessment	A risk assessment is estimated based on the size of purchased volumes from specific suppliers and risks associated with their sourcing regions.
3.1 Implementing effective supply chain engagement plan	Action plan	An action plan based on the due diligence/risk assessment to mitigate risks and support progress towards sustainability of their suppliers is developed.
	Implementation	
3.2 Participating in collaborative initiatives	Collaborative initiatives	The organization contributes to sector, landscape and jurisdictional initiatives to address key social and environmental problems in collaborative initiatives with other stakeholders
4.1. Practicing transparent disclosure & reporting	Transparent Disclosure	Transparent disclosures is communicated elucidating goals achieved, aspirations, progress and challenges.
	Grievance mechanism	A grievance mechanism is in place in order to receive complaints or comments from stakeholders regarding the conduct or SCP compliance of the organization.
4.2. Substantiating claims	Verification	Evidence of the organization's compliance with the supply chain requirements are available.

Two high-level workflows for the system are envisaged and these include the following steps:
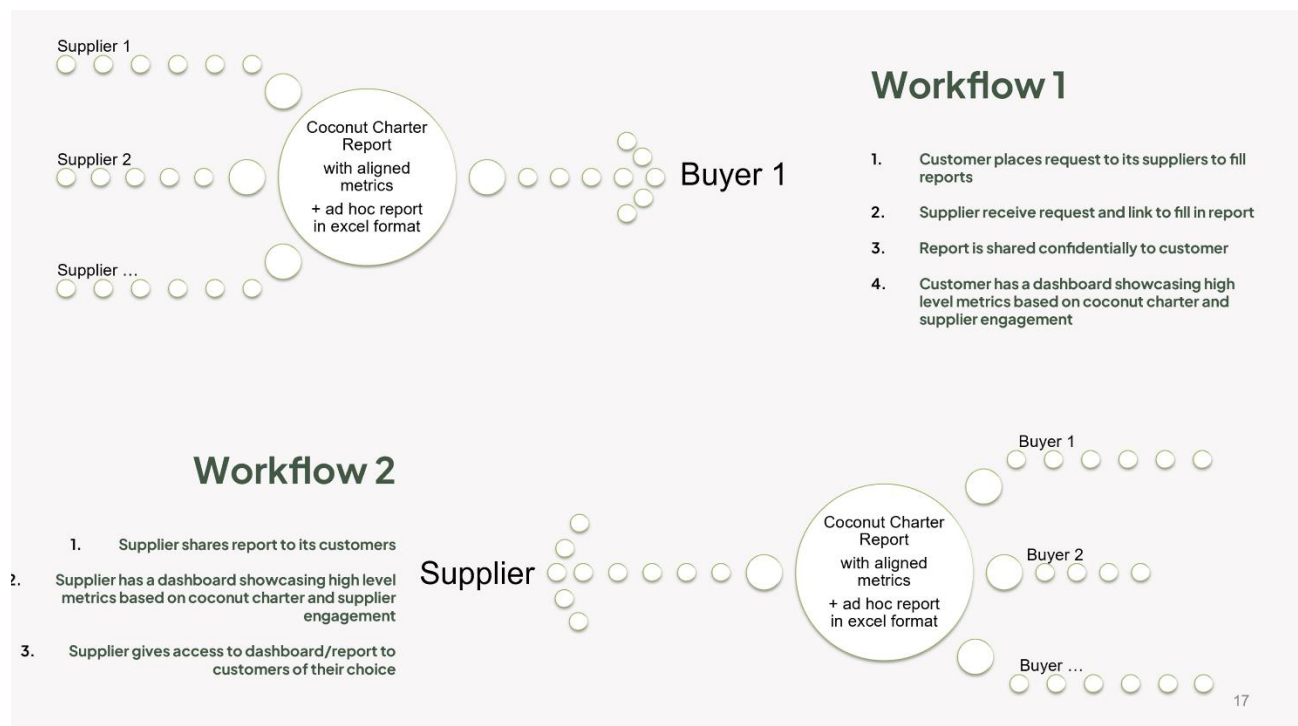
Further information about these workflows is provided below:

Workflow 1

1. Customer places request to X suppliers to complete a reporting form

2. X Suppliers receive the request and link to complete reporting form

3. Suppliers complete the reporting form and use a Sharing Function to send information confidentially to the buyer (who has been granted access). The form includes fields requesting sustainability information about their company, including:
    *   Questions requesting structured data (eg. Yes/No questions) or unstructured data (eg. open questions)
    *   Document uploads (eg. policies/certificates/external progress reports)

4. Buyer accesses the information submitted by suppliers, including:
    *   Summary of the information entered for each question in a report within database
    *   Download of information entered in excel and pdf formats
    *   Download of documents
    *   Analysis dashboard against high level metrics, based on the points in the Sustainable Coconut Charter, as well as other metrics to be defined, such as number of questions answered, % completion, and potentially quantitative and qualitative scoring of the data

1. Suppliers complete a reporting form. The form includes fields requesting sustainability information about their company, including:
- Questions requesting structured data (eg. Yes/No questions) or unstructured data (eg. open questions)
- Document uploads (eg. policies/certificates/external progress reports)

2. Supplier accesses a dashboard with analysis against high level metrics, based on the points in the Sustainable Coconut Charter, as well as other metrics to be defined

3. Through a Sharing Function, Suppliers authorize the sharing of information to selected buyers. This enables the selected buyers to access the information, including:
- Summary of the information entered for each question in a report within database
- Download of information entered in excel and pdf formats
- Download of documents
- Analysis against high level metrics, based on the points in the Sustainable Coconut Charter, as well as other metrics to be defined

In relation to the above workflows, it is also important to note that a company can be both a buyer and a supplier in some cases. Typically a B2B manufacturer would be a customer to its suppliers and a supplier to its customers.

Other requirements
- Data security and privacy for all users is paramount and must meet standards our members have.
- The platform should allow users to provide access to third party (auditors or other persons accredited) by giving dedicated access to dashboard and reports
- Business Model: dedicated and exclusive white labelled SAAS with licenses for SCP's industry members. (At present, 25 licenses required. There is a projection of yearly growth of the partnership's membership)
- The firm developing the platform should be able to ensure the continued improvement of the platform over the long term, adapting to the changing needs of users

Key tasks

1. Assess requirements and finalize design brief
- Engage with the Sustainable Coconut Partnership through the working group on Traceability & transparency to fully understand their requirements
- Identify any differences and areas where alignment between members is needed. These can be discussed by the working group to reach agreement
- Finalise the high-level design brief, including a summary of requirements for:
    o Types of information and documents which will be collected, stored and shared by the platform
    o Reporting Function and Dashboards: types of reports, analysis and visualization the platform will produce
    o Sharing Function: types of information to be shared, permission processes
    o Security and privacy requirements

2. Produce detailed plans for the design of the Coconut Sustainability Information Platform

- Detailed plans should be developed, including:
  - The architecture of the platform, including databases, user interfaces and Application Programming Interfaces.
  - The formulation of questions which will be asked by the platform, the standardised data formats and document types to be collected
  - Reporting Function and Dashboards: types of reports, analysis and visualization the platform will generate
  - Sharing Function: types of information to be shared, permission processes
  - Security and privacy processes
- Present the plans to the transparency and traceability working group, gather feedback and finalise in coordination with the Sustainable Coconut Partnership.

3. Develop a prototype version of the platform

- Develop the prototype version based on the design plans

4. Manage a pilot to test and gather feedback to improve the design of the platform

- Plan and implement a pilot of the prototype with a sample of members who plan to become users of the platform
- Gather feedback to improve the design and produce a summary of planned changes

5. Implement improvements and design the final version of the platform

- Improve the design of the platform, based on the feedback from the pilot

6. Launch the platform to members

- Promote the package to members
- Provide access to users
- Provide training and manuals to user to enable them to use the platform effectively
- Provide ongoing customer support to users

7. Further troubleshooting

- Carry out further troubleshooting to ensure the effective functioning of the platform

Deliverables

The deliverables for this assignment are as follows:

1. Final design brief for the Coconut Sustainability Information Platform

2. Design plans for the Coconut Sustainability Information Platform

3. Prototype version of the Coconut Sustainability Information Platform

4. Report on the pilot, including a summary of changes needed to the final design

5. Final version of the platform

6. Materials for the platform launch: including instructions and training materials

Budget

A maximum budget of 20,000 USD (inclusive of all relevant taxes) is available for the tasks and deliverables specified above.

Timeframe

- Contracting and start work by: 10 September 2024
- Delivery by: 15 December 2024

Proposal submission guidelines

To apply for this assignment, please send a short proposal (15 pages max, excluding CVs) to **jon@coconutpartnership.org**

Call published: 15 August 2024
Deadline for proposals: 30 August 2024

At a minimum, proposals should include the following components:

- **Company Profile:** An overview of your firm and relevant examples of work
- **Team Expertise:** A list of key team members who will be involved in the project, along with a summary of how they meet the profile needed for this assignment. Please include CVs as an appendix (not counted towards the page limit).
- **Proposed software and development process:** A summary of the software, relevant technical specifications and the process through which it would be developed, addressing each of the steps in the key tasks section above
- **Proposed approach to ensure data security and privacy:** please specify relevant measures and/or protocols used, such as Data Separation, Encryption, Data Protection Policies, Penetration Testing, Cyber security, Anonymisation, Decontextualisation, Data classification and segregated access.
- **Workplan:** A project timeline, outlining key activities, milestones and deliverables.
- **Business model[1]:** A summary of the proposed business model(s) for the platform. If relevant, multiple options may be presented. For each model, outline the structure (eg. one-time sales, subscription models, licensing fees, or usage-based) and proposed pricing
- **Budget:** A breakdown of your proposed budget up to a maximum of 20,000 USD. All costs associated with the tasks and deliverables specified above are eligible.

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[1] Through this assignment, the service provider will design the platform. Following design, it is envisaged that the service provider will sell access in a Software as a Service Model. Various models would be considered, including: (i) Service provider selling access to SCP, which then provides licenses to members (ii) Service providers selling licenses directly to members (iii) other models which meet the needs of SCP and members

Evaluation criteria

Proposals will be evaluated against the following criteria:

Proposed software and development process
- Extent to which the proposed software and the development process is able to meet the requirements listed in the objectives and scope section outlined above
- Realistic work plan and timeline for the development process

Company and project team expertise
Qualifications and experience of the company and the project team in the following areas:
- Expertise on sustainability in supply chains for agricultural commodities
- Previous experience designing databases to store and share sustainability information among supply chain partners
- Written and spoken English language skills

Business model
- Extent to which the business model will enable the system to operate in a way which is affordable for members and financially sustainable over the long term for the software firm
- Extent to which the firm is able to ensure the continued development and improvement of the platform over the long term

Budget
- Competitive and well-structured budget

We look forward to receiving your proposal. If you have any questions or require additional information, please contact Jonathan Bird – Supply Chain Transformation Manager, Sustainable Coconut Partnership at jon@coconutpartnership.org.

The Sustainable Coconut Partnership