

## Request for Information

### Reporting Platform for The Sustainability Consortium

*The Sustainability Consortium (TSC) is investigating partnership options for an online platform to host its sustainability measurement and reporting tools for consumer goods supply chains.*

#### Background:

In TSC's Measurement and Reporting Program, TSC uses the demand signal from retailers, brands, and other major purchasers to increase the implementation of sustainability assessments and improvement projects across the value chain. TSC's tools are now used by consumer product manufacturers to report on product sustainability representing over \$200Bn in retail sales. Many of these products are sold by major food and consumer goods companies that have reported the sustainability performance of their products for at least three consecutive years.

To date, TSC has created over 130 product category-level science-based questionnaires used by thousands of manufacturers to report their performance to their retailer customers. In addition, TSC has developed supporting tools and services including implementation consulting, category selection aids, a help desk service, supplier action recommendations, and data analytics. Collectively, the questionnaires, tools, and services may be referred to as "measurement and reporting content".

TSC's historical focus has been on the business interface between retailers and their major tier 1 suppliers, manufacturers, and brands. More recently, we have worked to develop content and partnerships in two upstream areas:

- IT Ecosystem Project: Enabling tier 1 suppliers to cascade questions back to their suppliers and their suppliers' suppliers, with the objective of improving the transparency and data availability for retailer-facing KPIs that cover upstream hotspots
- Ag Data Landscape Project: Building collaborations between the many different on-farm data gathering tools and systems to promote inter-operability between those systems and with TSC KPIs. This has included an API to do the real-time conversion of KPI responses from one system to another

While these upstream projects continue to grow and evolve, we want to focus again on the retailer reporting opportunity to make sure we are always including the best sustainability content; functionality for suppliers; insights and tools for suppliers; as well as data, analytics, and insights for retailers.

## Scope

The partner will work with TSC to develop a new online reporting platform for its content and serve its thousands of users, as well as supporting processes and infrastructure. The platform may be an extension of an existing platform owned by the partner or a new one developed specifically for this purpose. However, TSC reporting will have a clear and separate identity from any products or services offered by the partner (integrations with other services offered by the partner may be considered).

The platform would need to host TSC content in its current form and accommodate planned new features. Core features and functions are described in Annex 1: Platform features and functions. Additional details for platform design and operation will be discussed with the selected partner.

The platform must have a contemporary look and feel and otherwise meet the user experience expectations of the professionals who will use the platform. TSC's content must be accurately, faithfully, and clearly represented to the users.

The partner would be responsible for platform development, timely ongoing maintenance, and supporting TSC in platform administration.

## Draft Timeline:

Dates	Actions
December 3, 2018	RFI Response Deadline
December 2018 - January 2019	TSC review of submissions and follow-up calls, as needed Strategic planning and decision-making by TSC
February 2019	Partnership creation, platform specification, implementation plan
March - June 2019	Development
June – August 2019	Testing and finalization
August 2019	Platform launch and first users
October 2019 forward	Broad use of platform, platform maintenance, improvements

## RFI response content:

Please email a copy of your written RFI response to Christopher Cooke ([christopher.cooke@sustainabilityconsortium.org](mailto:christopher.cooke@sustainabilityconsortium.org)) and Jessica Ginger ([jessica.ginger@sustainabilityconsortium.org](mailto:jessica.ginger@sustainabilityconsortium.org)) by close of business Monday December 3, 2018.

Responses should include:

1. Name, title, address, telephone, and e-mail for your company's primary contact for the project.
2. General business information (up to 1 page):
  - Year and state or country of incorporation
  - Length of experience
  - Functional areas of expertise, including any competences in sustainability, consumer goods, supply chain communication and management, and/or retail
  - In which countries user data is held and platform development is completed
  - A link to your most current annual report and/or financial disclosures

3. Summary description of your proposed approach to platform development, referencing the features and functions described in Annex 1 (up to 4 pages). Include specific responses to the following questions:
  - Would you build on an existing platform or develop a standalone solution?
  - How do you make use of industry best practices for IT development and quality processes?
  - Do you have a help desk system to assist all users with using and troubleshooting the platform, regardless of time-zone?
  - How would you address data privacy and security?
  - What is your proposed approach to commercial, legal, and IP aspects of the partnership? Here, we are interested in proposals for different ways of structuring this including an up-front payment structure and/or ongoing fees, or revenue-sharing
  
4. Provide a high-level description of your client base for similar services, including information on (up to 1 page):
  - Number of customers
  - Geographic distribution of customers
  - Potentials for synergies and/or conflict of interest in customer base

## Annex 1: Platform features and functions

This table describes the features and functions necessary for a successful online platform for reporting of product category-level sustainability performance data between different organizations within consumer goods supply chains using content created by The Sustainability Consortium. The features and functions are prioritized as essential, high, or medium priority. The term “responding user” is used for companies that are entering data (e.g. manufacturers) and is used interchangeably with “supplier”. The term “receiving user” describes those that are viewing the reported data (e.g., retailers and manufacturers).

Category	Feature/function	Priority	Description
<b>Accounts</b>	Organization-level account	Essential	Organizations will be able to have defined user accounts with relevant profiles, rights, and permissions. User types include, but are not limited to, companies in manufacturing, consumer goods supply chains, and retail, and other purchasers of consumer goods.
	Multi-user support	Essential	A single organization may create multiple users with relevant permissions. Each account may have multiple business IDs associated with it as necessary to connect to the supplier records of organizations receiving data. A mechanism is needed to ensure only one person is designated as administrator per supplier account, but persons can request to be a primary contact for a requesting/receiving user. Secondary priority: An organization may assign different KPIs to different users and invite them to the platform if they do not already have an account.
	Supplier Identification	Essential	Receiving users have access to simple search tools that let them identify which of their suppliers are already registered on the system individually and in batches
	Tiered privileges	Essential	Users' access to certain features will depend on defined tiers of accounts (e.g., premium, basic). May be limited to receiving users.
	User notifications	Essential	User account home pages will have a prominent notifications section listing items that need attention such as:  Incomplete questionnaires New content releases New messages Deadlines (from receiving users) Updated analytics (as other users enter data)

Category	Feature/function	Priority	Description
	Multi-user communication abilities	High	<p>Responding users shall be able to receive communications from both TSC and receiving users concerning, for example, content updates, additional tools, and reporting schedules/deadlines (per receiving user).</p> <p>For suppliers with existing organizational accounts, the receiving user shall be able to simultaneously communicate to their primary contact, who may not yet be on the system, and the administrator of the supplier's account.</p>
<b>Reporting process</b>	Questionnaire self-selection	Essential	<p>Using a TSC-provided logic, the platform will provide reporting organizations to identify the product category questionnaires/surveys which are applicable to them. The user is guided step by step through the process or may search the catalog for an appropriate match.</p> <p>Essential: Category level Potential: product level</p>
	Publish-subscribe reporting model	Essential	<p>Users have the ability to enter their data into the platform at any time (perhaps with exceptions during content updates), not dependent on a set reporting period set by TSC or another organization. They may select which other users (e.g., retailers) may access the data (in some form) at any time. Users that would like to access the data (e.g., retailers) may submit requests for access. This additionally requires a mechanism to ensure that data isn't "expired" at the time it is shared (i.e., is for a relevant reporting period). Additionally, a mechanism for TSC to communicate to users how pending content updates will affect currently entered data.</p>
	Wizard-style reporting process	Essential	<p>Provide users with (optional) "wizard" that walks through clearly defined steps for the reporting process, particularly category self-selection. This should include the ability to request user confirmation (e.g., "I understand the scope of this questionnaire") at necessary steps.</p>
	Data management	Essential	<p>Data exchanged between users shall remain the property of the reporting organization. By agreeing to use the platform, each user shall agree to give TSC the access to the data for the purposes of analysis, summary reports, and KPI quality control. (Note: TSC will not make identifiable data public or share with other organizations without express consent of the reporting organization.) Receiving users shall have access to the data for their internal decision making but shall not be able to make identifiable data public or share with other organizations without express consent of the reporting organization.</p>

Category	Feature/function	Priority	Description
	Multi-cycle data management and change process	Essential	Provide all users the ability to manage data over multiple reporting cycles and the ability to reuse/review answers from previous cycles and apply to current cycle. Any changed and soon-to-change questionnaires and KPIs are clearly flagged. System for tracking changes in questionnaire consistency and comparability between reporting cycles and content updates.
	Reporting status	Essential	Ability for TSC and receiving users to view the number of registered users, their current reporting status, connections to other users, etc.
	User instructions and guidance	Essential	The platform will provide the ability to create user instructions and guidance at all necessary points in the user experience. This includes, but is not limited to, survey scope descriptions, response procedures, calculation steps for each KPI, relevant resources for each survey and KPI, links, and term definitions.
	Downloadable documents from TSC	Essential	While completing a questionnaire, users have access to related downloadable files (e.g., guidance documents etc.). The number and type of files may vary by questionnaire. The download capability should be easily accessible and clearly associated with the questionnaire/survey. The same content should also be viewable on platform in a central location.
	Progress saving	Essential	Responding users may save their progress at any point. Saves will be time stamped and reversible.
	Help desk	Essential	The platform provider will operate a help desk for inquiries related to the operation of the platform, such as account management, unexpected behavior, lost data, etc.
	Channels for sales of additional products and services from TSC	High	While completing a questionnaire, users have access to purchase complementary tools and services. One-click purchase links should be easily accessible and clearly associated with the point(s) in the questionnaire when the additional tool or service will be useful. The user should be returned to their point in the questionnaire with immediate access to the tool or service. The complementary tools and services should also be viewable on platform in a central location.
	Contextual guidance	Medium	In addition to the guidance content associated with each KPI, users may click on key terms, concepts, or elements for additional guidance (e.g., definitions)
	Dynamic questionnaire generation based on user input	Medium	The platform generates a questionnaire from a KPI bank based on user-inputted parameters. This is dependent on significant content development by TSC so is not currently a priority.

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	Built-in calculators	Medium	Some TSC KPIs require multi-step calculations before a final response can be entered. The platform would host calculators to aid in this process. This data would be kept private to the users and not shared or reported to other users or TSD.
	File attachments (survey level)	Medium	Users are able to attach a file or files to a survey response.
<b>Data entry and KPI capabilities</b>	Multiple data types, relationships, and response options	Essential	<p>The platform will provide support for open-ended KPI designs with any number of response options of different types. Response options may be quantitative (percentages, integer, decimal) or qualitative (single text, drop-down list of choices, etc.).</p> <p>The response options may have any number of relationships to other response options within or between KPIs. This includes the ability for multiple selections/entries within a KPI, if-then relationships, not-if relationships (ORs), relating groups of response options to other groups or individual response options. These relationships may depend on a selection alone, an entered value, or other conditions.</p> <p>Constraints may be placed on response options so that certain values may not be entered (e.g., 0-100% only, values may not add to more than 50).</p> <p>A special "not applicable" response option type allows the user to indicate that the KPI does not apply to them if certain conditions are met. The KPI would be excluded from scoring. Not all KPIs will have this response option type.</p>
	Error controls	Essential	The platform will prevent reasonable user data entry errors and provide appropriate warnings when errors have been made or are likely (e.g., entering a 0, negative number, very large number).
	Collecting un-scored information	Essential	<p>In addition to the KPIs, users may receive separately, or as part of a survey, questions that are not included in their score(s). These questions may be asked as part of the self-selection process, during completion of specific surveys, or in addition to and associated with specific KPIs within a questionnaire. The information may be used in user-facing analysis (e.g., comparing to similar suppliers).</p> <p>Preferably, the questions may be included dynamically, in response to user inputs (e.g., if a 0 is entered for a KPI, if the company meets certain conditions, etc.).</p>
	User-selected units	High	Users can choose which units they use to report non-percentage numerical values metrics (e.g. kg/tonne vs lb/ton). The platform converts the values to a defined unit but does not change the user's entry.

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	Comment function	High	One or more free text fields is available for each survey and for every KPI for users to enter their own comments. Fields may be labeled for a receiving user (e.g., retailer), or for the content provider (TSC). The fields will be accompanied by a communication of which receiving users have expressed an intention to review comments and which have not. The function may be turned off as needed.
	Supplier notes	High	A free text field per survey and KPI that allows a reporting user to record notes for internal reference only. This information would not be viewable by any other users.
	Response option level "unable to determine"	High	For KPIs with multiple response options, users may indicate that they do not know their response to a specific response option rather than entering zero or defaulting to a lower response option. Scoring within a KPI would be more variable, making interpretation more complex
	Ability to indicate if a response is the result of an audit or otherwise verified (and provide documentation)	Medium	KPIs may be designated as being auditable. Users may indicate if an audit has been performed (e.g. using a check box). This may prompt a file upload for supporting documentation. This feature would not always be activated.
	File attachments (KPI level)	Medium	Users are able to attach a file or files to a specific KPI response.
	Response option level N/A	Medium	Response options may be flagged by users as being "not applicable" if certain conditions are met. The scoring of the KPI would adjust accordingly.
<b>Scoring</b>	Default scoring	Essential	The platform will support the TSC-created default scoring schemes for all KPIs and surveys. Response options are assigned individual scores/weights. Scoring for quantitative response options may depend on the entered value (e.g., 5 pts * 37%) or be calculated relative to a reference value (either pre-defined or relative to a calculated average/median, etc.). Scoring for qualitative response options may be static or depend on other response options. A score is calculated for each KPI from the response options using conventional arithmetic. A survey-level score is calculated from the KPI scores and any additional weighting using conventional arithmetic.
	Scoring visibility	Essential	Scoring should be visible to all users during response process. If any customization is used, there will be a mechanism for displaying and differentiating default and custom scoring

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	Scoring of open-ended quantitative responses	High	KPIs with open-ended quantitative response options (e.g., emissions intensity) may be scored relative to reference values or relative to the values entered by other suppliers (e.g., median, z-score).
	Clusters/sub-scores	High	Defined grouping of KPIs with a questionnaire may receive calculated sub-scores within a survey (e.g., score on manufacturing vs. farm).
<b>Content administration</b>	Batch upload of questionnaires, self-selection logic, and survey structure	Essential	TSC will be able to directly upload new or revised content to the platform in a complete or partial batch.
	Individual upload of questionnaires	Essential	TSC will be able to directly upload new or revised content to the platform individually
	On-platform editing of content	Essential	The platform will provide the ability for TSC to directly edit the content. This includes editing the text of KPIs, the number and type of response options and relationships, scoring, and adding or removing KPIs from a survey. If scoring changes are necessary while the content is live, users will not lose entered data unless necessitated by the change. Any KPIs with changed response options for live content must be flagged for user review. Surveys may be created or removed at any time. Affected users will be notified.
	Testing	Essential	The platform will provide the ability to test content before it is made live. The platform provider will conduct a technical review of content updates to ensure correct operation.
	Demo capability	Essential	TSC will have access to demonstration features including dummy users and surveys for the purposes of communication with current and potential users.
	Provisional KPIs	High	Surveys/questionnaires may include KPIs that are being tested for viability but otherwise do not affect the user results.
<b>Custom content</b>	Custom questionnaire support	Essential	<p>Users have the ability to create custom questionnaires on the platform . TSC may act as the intermediary in content creation. The information reported through these questionnaires is viewable only to the responding users and the requesting user. Users may add individual KPIs to TSC surveys. These additional KPIs would not affect the default scoring but may be included in the user-specific scoring.</p> <p>The platform will include clear two-way communication and management tools for the administration of custom questionnaires. This includes a clear list of the requested questionnaires, identification of the requesting user(s), associated scoring, ability to decline a request, and deadlines.</p>

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	Private questionnaires	Essential	Users may request specific responses that are only visible to invited users. This may custom questionnaire, or a unique application of a default TSC questionnaire Reporting may operate under a request-respond model or a specialized self-selection model.
	Custom scoring/weighting of KPIs	Essential	Receiving users may set different weights for the KPIs to be used in calculating survey-level scores. Responding users would be able to view their scores through the default scoring or through the customized scoring of each receiving user. This will include setting weights to 0 (i.e. create sub sets). Any use of custom scoring is clearly communicated on-platform to responding users. Scoring may be adjusted after data is entered. TSC may provide pre-defined weight sets for a user to select.
	Scoring/weighting within KPIs	Medium	Receiving users may set different weights for the response options to be used in calculating KPI-level scores. Responding users would be able to view their scores through the default scoring or through the customized scoring of each receiving user. This will include setting weights to 0 (i.e. create sub sets). Any use of custom scoring is clearly communicated on-platform to responding users. Scoring may be adjusted after data is entered. TSC may provide pre-defined weight sets for a user to select.
<b>Benchmarking and analytics</b>	Robust scorecards and reports	Essential	The platform will provide all users with robust and customizable scorecards (dashboard) and reports of the reported data (scored and unscored). Responding and receiving users would see related but different results. Scorecards/reports will be visible at any time during survey completion and stored for future reference and analysis. The results will update as new data is entered by users. Specific elements are detailed below.
	Respondent comparisons	Essential	For survey and KPI scores within and across receiving users By product hierarchy/sector Similar KPIs across categories By demographic (geography, size, years reporting) Anonymized
	Year-over-year analysis	Essential	For individual company In comparison to other respondents Across all other metrics
	Category level	Essential	Category-level summaries of supplier performance
	Response option-level distributions	High	Distribution of entered percentages (e.g., % recycled content), or rate of selection for qualitative response options.

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	View results through default and custom scoring	Essential	Responding users may see their own results with all applicable scoring. This includes the default scoring and any custom scoring from receiving users.
	Participation/Non-compliance rate (receiving user)	Essential	Across all suppliers By buyer/department By category
	Supplier turnover (receiving user)	Essential	Participation by year New suppliers Continuing suppliers
	Buyer-focused (receiving user)	Essential	Analytics for individual buyers/departments representing groups of suppliers. Groups may be defined through the self-selection classification or by users. User-defined mapping should be completed in a batch process (e.g., uploading a mapping file)
	High quality downloadable results	Essential	Responding users may download their own response data for all reporting cycles and categories. This will include scoring where relevant. Analysis results may also be downloaded. Receiving users may download the data for all respondents including default and custom scoring where relevant. Spreadsheet, CSV (essential) Charts, diagrams (high priority)
	Support for TSC's action recommendation model	Essential	Scorecards and reports will include content drawn from TSC's action recommendation model. This includes action recommendations for the responding organization as a whole, per survey, and per KPI. Responding and receiving users may see different results. Receiving users may identify priorities for action to be communicated to responding users.
	Ability to share to teams on platform (Responding/receiving)	High	Users may create and send reports to other users, account holders, and guests.
	Performance Planning Tools	High	Suppliers can plan their improvement strategies by indicating their company priorities and comparing with their receiving user priorities. Additional data points include KPI benchmark performance, frequency KPI appears across multiple categories for supplier, and level of effort required to improve. The tools will enable to set their own parameters for some fields (e.g., level of effort required to improve).
	Badging	Medium	TSC and/or receiving users may create badges to be awarded if certain conditions are met (e.g. bronze/silver/gold, top ten). These may be displayed on scorecards, reports, user profiles, avatars, or in other applications.

Category	Feature/function	Priority	Description
<b>Integrations and connections</b>	Support for connections to upstream/aligned platforms	Essential	The platform must be built in a way that would allow connections to other reporting systems to be established. This may include services which assist users with upstream data collection and calculate responses that can be directly transferred to the platform, bypassing manual user entry. These connections would be established on an ad hoc basis.
	Compatibility with data reconciliation service	Essential	The platform must be built in a way that would allow certain reported and user profile information to be compared against a central service for reconciliation with data stored in other locations should such a service be established by TSC.
	Connection to TSC questionnaire selection definitions	High	If TSC creates a centralized source for self-selection logic, the platform would be directly and dynamically connected.