

REQUEST FOR PROPOSAL FOR SERVICES AS THE CHR B RESEARCH PROVIDER 2020

INTRODUCTION

The Corporate Human Rights Benchmark Ltd is in the process of merging with the World Benchmarking Alliance (WBA). In the future, any contract for outsourced research support will be with the WBA, not CHR B. As such, WBA's procurement rules require a public tender for large contracts.

This RFP sets out a draft scope of work for research provider support required to deliver the Corporate Human Rights Benchmark (CHR B) in 2020. It is provided to enable interested parties ('you') to develop initial cost estimates and options to deliver the scope and as such should not be viewed as any form of agreement between you and the CHR B or WBA. The research provider is not expected to create or revise a methodology, but to implement the [CHR B methodology](#) using the existing disclosure portal and deliverables set out below. WBA and CHR B plan to maintain a core team of CHR B staff, who lead on certain aspects such as company engagement, but wish to partner with a third party to deliver the research.

EXPECTATIONS OF THE PROPOSAL

We expect that your proposal will, first and foremost, estimate the personnel and financial resources required to deliver the CHR B methodology in line with the expectations and draft deliverables listed herein. Furthermore, CHR B anticipates that you will be able to demonstrate how you will deliver in three key areas: researcher quality (interpreting large volumes of written data and scoring companies against our methodology), human rights experience (depth of knowledge regarding human rights and business) and research intensity (being able to handle in-depth research of 200 companies within condensed timeframes).

The feedback CHR B received following the launch of the pilot benchmark raised the perceived issue of inconsistencies in the interpretation of evidence by the 2016/2017 researchers, resulting in (reportedly) different scores for the same performance. Further feedback raised concerns that the researchers had insufficient experience in interpreting human rights related information in the public documents. This issue has had a strong focus by the researchers in 2018 and 2019 and you are encouraged to detail both how the consistency of interpretation can be ensured and how sufficient human rights experience will be included in the research team. Examples of company assessments are available on the CHR B website.

CHR B expects that proposals will detail the tasks, time and costs involved, including day-rates for staff of various seniorities, breakdown for any sub-contracting, costs for using any proprietary software/databases and an eventual 'cost-per-researched-company'. Responses to this RFP should be sent to d.neale@worldbenchmarkingalliance.org by the 30th September 2019. Requests for extensions and clarifications should be sent to the same address. Project kick-off is anticipated to take place in December 2019. The tendering process will be conducted in line with the WBA Procurement [Policy](#) 2018-2022 (Concept).

SCOPE OF 2020 BENCHMARK

- The 2020 benchmark will repeat the core benchmarks for four sectors (apparel, agricultural products, extractives and ICT manufacture), consisting of the 200 companies in the 2019 benchmark. In addition, 25 further companies will be benchmarked against the Automobile Manufacture methodology which will be released prior to the research phase.
- The 2020 benchmark will use the CHRB Methodologies and the research will take place within the annual CHRB cycle, consisting of five key phases: Initial scoring and sharing with companies, company review and engagement, secondary assessment, quality check and final scoring, and appeals process.

DRAFT DELIVERABLES IN 2020

The list below is indicative and can be added to. If your organisation could only deliver elements of the deliverables or elements of the methodology assessment, you are encouraged to provide additional details. With 225 companies, CHRB will engage externally over a period of time. As such, initial results and secondary reviews will need to be phased, with detailed timelines for each group of companies.

Core Deliverables

1. Project Management and Quality Control processes, including project plan, weekly check-ins, monthly reports, closeout report and named senior lead/project managers.
2. Alignment – ensuring there is a process that can deliver the requirements of the CHRB methodology and setting up the research framework.
3. Training – ensuring the research team can deliver the requirements of the methodology
4. Research phase 1 – initial scoring of 225 companies against the full methodology. There will be access to the full 2018/2019 results, meaning that for most companies there will only be top up scoring on information released in the second half of 2019. Sharing the initial results and draft scorecards with CHRB in mid-April to mid-May.
5. Research phase 2 – supporting CHRB during the engagement phase, by answering questions, receiving feedback from CHRB following calls, entering company feedback into database for review (but not directly engaging with companies). Engagement with companies will take place from end of April to end of June. Companies have a time window to publish and/or refer to new information (likely phased to end mid-July).
6. Research phase 3 – finalising scores based on additional data and feedback from companies that have responded to CHRB via the engagement process and/or uploaded files to the public portal. This will take place in July and August.
7. Research phase 4 – quality checks and production of final results (including 225 scorecards and full MS Excel dataset) and handover of the database. Hard deadline for final products anticipated for 20th September.
8. Research phase 5 – appeals process. On call to respond to legitimate appeals from companies after their scores are published (Dec-Jan). There were approx. 50 appeals in 2018 (one appeal per indicator queried), with the researchers checking validity in terms of: sources published in time for research, sources covered in research, interpretation of published information (checking researcher work) and recommendation for full review if deemed eligible (the CHRB website has more details of the Appeals Process).

It is assumed that company scores for each indicator, theme and overall, will be built into the research database and will be easily exploitable to create external scorecards and data-sheets for use by third parties. The internal research management database should:

- House the researcher commentary and scores, with logging to provide tracking of entries
- Be accessible by the CHRB team and the research-provider's team during the research phases
- Be exploitable (i.e. all the data can be downloaded into CSV / XL format, based on selection criteria)
- Be handed over to CHRB on completion

EXPECTED TIMELINE FOR 2020 BENCHMARK

The table below provides an **indicative** timeline for the 2020 benchmark cycle. CHRB is restricted by the reporting cycles of companies (at the start of the process) and a latest launch in Q4 (at the end of the process – likely mid-November). Final timelines will be agreed with the research provider. Text in *italics* is CHRB focused.

TIMING	ACTIVITY
Nov 2019	Confirm research provider contract
Dec 2019	- <i>Publish any revisions to methodology and inform selected companies of process for 2020</i>
Jan 2020	- <i>Contact companies to request new information</i> - <i>Portal open to companies</i> - Commence selection of severe allegations for Theme E assessment ¹ - Database ready for inputs - Researcher confirmation and training
Mid Feb – early May	- Conduct initial research and produce 3 or 4 tranches of draft scorecards for company review (includes time for initial quality checks) - <i>CHRB sends draft scorecards to companies</i>
Mid Apr – End June / mid Jul	- <i>Engagement window with companies, following internal company review of draft scores</i> - <i>Companies able to upload or refer to additional sources until end June / mid July depending on tranche</i> - Respond to any questions from CHRB on the research
Mid – end Jul	- <i>Collate company feedback for use by researchers</i>
July & Aug	- Second research period to look at new data and sources, taking into account feedback from engagement
Mid Aug – Mid Sep	- Quality and consistency checks - <i>Scoring spot checks</i>
Mid Sep	- Delivery of scorecards, datasheets and database
Mid Nov 2020	<i>Publish benchmark results and reports</i>
End Nov – Jan 2021	Appeals process and score revisions as required

¹ CHRB currently draws on 3 sources (Vigeo-Eiris controversies database, RepRisk database and Business and Human Rights Resource Centre allegations dataset). The Vigeo-Eiris & Reprisk database are accessed through existing agreements and proposals should therefore detail how they will replace access to such datasets to identify appropriate allegations for review in detail. Proposals should also address any data sharing limitations that may be involved with accessing allegations datasets.

SUPPORTING NOTES

1. Deadline for submission is the 30th September 2019. Clarifications may be requested within this period from d.neale@worldbenchmarkingalliance.org.
2. Contract decision is anticipated for end of November 2019.
3. Proposing companies should familiarise themselves with the WBA Procurement Policy (Concept) which provides a framework for this RFP, in particular p.4-8, p.20-23 and noting that:
 - a. Draft general terms and conditions are included in the WBA Procurement Policy
 - b. Standalone Data Protection Agreements are not envisioned for the proposal
 - c. Proposal review template will be adapted from p.21-22
 - d. The WBA Procurement Policy (Concept) is in the process of being updated
4. Theme E – serious allegations – is anticipated to be the only element that organisations may wish to separate out when bidding for the research project.
5. A fixed total cost budget is anticipated, but days, day-rates and fixed costs should be detailed in both pound sterling and euros. Breakdowns of the time and cost for various phases of research are encouraged.
6. Research provider will need to work closely with CHRB and WBA staff, so a seamless/accessible research database is preferred.
7. Research providers wishing to use existing research to support the project (for example a data-provider with pre-existing human rights indicators) would need to demonstrate the complete alignment with the CHRB Methodology.
8. Conflicts of interest, particularly related to support services to the companies assessed, should be referenced in the proposal – and how to deal with them.
9. Research will be conducted primarily in English and is based on publicly available information, so any researchers will need exemplary English language skills to understand the nuances of the methodology and research.
10. CHRB staff are headquartered in the UK, therefore consideration will be made of the feasibility of team integration where the research team, or significant components of it, are based in time zones that preclude easy communications.
11. Proposals should include key assumptions made by the proposing organisation (such as the number of allegations to be assessed).
12. Detailing examples / experience of similar work is encouraged.
13. Full research team does not need to be named, but lead staff backgrounds and experience should be disclosed where possible.
14. The WBA and CHRB are not-for-profit entities who receive funding from national governments and foundations in pursuit of public-good benchmarks. Please consider this during the scoping of any proposals.
15. A proportion of the CHRB indicators will likely be applied to 2,000 companies in future SDG Benchmarks for the WBA. Proposing companies may consider and allude to follow on services in the proposal, but should not cost them in or include them in the resource planning.

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