

Terms of Reference (ToR)

Comprehensive Socio-Economic Survey to Support SDG and Safeguards Monitoring for KACP and LMEP

Background and rationale

Vi Agroforestry is an international development organisation working with smallholder farmers to address poverty and climate change through sustainable agroforestry systems. The organisation is implementing two AFOLU carbon projects in Kenya: the Kenya Agricultural Carbon Project (KACP) and the Livelihoods Mount Elgon Project (LMEP). Both projects are required to demonstrate measurable sustainable development outcomes and effective environmental and social safeguard management in line with verification standards and national regulations. Across both projects, key SDG and safeguards indicators require reliable household-level socio-economic data (e.g. income, food security, gender, and financial access). Therefore, Vi Agroforestry seeks a consultant to design, develop and implement a robust, repeatable socioeconomic survey approach using two separate but aligned instruments for KACP and LMEP.

Overall Objective

To assess and quantify the socio-economic outcomes and benefits generated by KACP and LMEP to date, while establishing a robust and repeatable survey approach to support ongoing monitoring of SDG and safeguards indicators.

Specific Objectives

The consultant will:

- Assess current socio-economic conditions and project-contributed changes in livelihoods, including income, food security, gender dynamics and access to services among participating households
- Demonstrate project contributions to sustainable development outcomes, drawing on both current household data and available project information
- Generate credible values for priority SDG and safeguards indicators, using a harmonised approach across both projects
- Fill targeted data gaps for indicators where baseline or monitoring data is incomplete or inconsistent

Vi Agroforestry

Postal Address: Vi Agroforestry, P.O Box 2197-00606 SARIT CENTRE, 00100 Nairobi, Kenya

Visiting Address: Ikigai, Westlands, Peponi Road

Phone: +254768 765 948

Web: www.viagroforestry.org



- Design two separate but aligned survey instruments for KACP and LMEP, allowing comparability while reflecting project-specific contexts
- Establish a repeatable survey methodology and tools (sampling, questionnaires, QA/QC procedures) for future monitoring during the crediting period
- Produce clean, well-documented, and audit-ready datasets and reports to support verification, national reporting, and internal decision-making

Scope of Work

The Consultant shall design, develop, pilot, and implement robust socio-economic survey systems for KACP and LMEP, ensuring full alignment with SDG indicators and Environmental, Social, and Governance (ESG) safeguards frameworks. The scope shall include:

- **SDG & ESG Indicator Mapping**
 - Map all required SDG indicators (e.g., SDG 1, 2, 5, 13, 15) and applicable safeguards indicators to measurable household-level variables
 - Ensure alignment with carbon standard requirements (e.g., Verra / Plan Vivo) and national regulatory frameworks
- **Survey Instrument Design with Answer Keys:** Develop structured questionnaires with:
 - Clearly defined variables and indicator linkages
 - Pre-coded response options and scoring systems (answer keys) for all SDG and safeguards indicators
 - Defined calculation methodologies for derived indicators (e.g., income change, food security index, gender empowerment indicators)
 - Ensure consistency across KACP and LMEP while accommodating contextual differences
- **Indicator Calculation Framework:** Develop a complete **Indicator Reference Guide**, specifying:
 - Indicator definitions
 - Data sources (survey fields)
 - Calculation formulas
 - Units of measurement
 - Disaggregation requirements (e.g., gender, youth, location)
- **Sampling and Survey Implementation**
 - Design statistically robust and representative sampling strategies
 - Ensure traceability for verification (audit-ready sampling frames)
- **Digital Data Collection System**

Vi Agroforestry

Postal Address: Vi Agroforestry, P.O Box 2197-00606 SARIT CENTRE, 00100 Nairobi, Kenya
Visiting Address: Ikigai, Westlands, Peponi Road

Phone: +254768 765 948
Web: www.viagroforestry.org



- Configure digital survey tools (e.g., ODK, Kobo, SurveyCTO or equivalent) with built-in validation rules, skip logic, and real-time data checks

Deliverables

The consultant shall provide the following deliverables for each project (KACP and LMEP), with a consolidated summary where relevant:

Inception Report: Detailed methodology, sampling design, and workplan

Survey Toolkits: KACP and LMEP questionnaires (aligned but project-specific)

Pilot and Final Survey Tools: Finalised, field-ready tools and QA/QC procedures

Clean Datasets and Documentation: Final cleaned datasets (project-level and harmonised where applicable)

Socio-Economic Survey Reports (Per Project): Each project report shall; present current socio-economic conditions of participating households; analyse project-associated benefits and changes in livelihoods to date, provide values for priority SDG and safeguards indicators as well as include practical recommendations for project improvement

SDG Contribution and Safeguards Report (Per Project)

The consultant shall produce a dedicated report for each project (KACP and LMEP) that demonstrates project contributions to sustainable development outcomes and Kenya's NDCs based on survey findings. Also, the consultant will ensure systematic filling of the SDG and Environmental & Social Safeguards Monitoring Frameworks, based on survey data.

Stakeholder validation workshop. presentation of findings to Vi Agroforestry including a consolidated cross-project Summary

Consultant/Firm Qualifications

- Postgraduate qualification (preferred) or equivalent experience in agricultural sciences, Environmental sciences, Natural resources, M &E, social sciences or related fields
- Proven experience in designing and implementing household socio-economic evaluations and biodiversity assessments
- Experience in smallholder or agricultural development contexts in East Africa
- Certified or registered EIA/EA expert (or equivalent experience) is desirable
- Basic understanding of carbon projects requirements including MRV, standards and national regulations
- Familiarity with SDGs, NDCs, safeguards or similar monitoring systems
- Strong analytical and reporting skills

Vi Agroforestry

Postal Address: Vi Agroforestry, P.O Box 2197-00606 SARIT CENTRE, 00100 Nairobi, Kenya

Visiting Address: Ikigai, Westlands, Peponi Road

Phone: +254768 765 948

Web: www.viagroforestry.org



Vi Agroforestry

Application Procedure

Qualified consultants (or firms) are invited to submit:

- Technical proposal outlining the approach to the assignment
- Financial proposal including total cost and cost breakdown
- Proposed timeline for delivery
- CV(s) and relevant experience, including examples of similar assignments

Send an email to: procurement.roea@viagroforestry.org by deadline of **21st June 2026**

Vi Agroforestry is an equal-opportunity employer committed to diversity and inclusion in the workplace. We encourage applications from all qualified individuals regardless of race, ethnicity, religion, gender, sexual orientation, disability, or age.

Postal Address: Vi Agroforestry, P.O Box 2197-00606 SARIT CENTRE, 00100 Nairobi, Kenya

Visiting Address: Ikigai, Westlands, Peponi Road

Phone: +254768 765 948

Web: www.viagroforestry.org