



ORGANISATION OF EASTERN CARIBBEAN STATES

INVITATION FOR EXPRESSIONS OF INTEREST

CONSULTANCY SERVICES

FOR

**DEVELOPMENT AND IMPLEMENTATION OF A BRANDING AND MARKING STRATEGY
FOR THE OECS/USAID EARLY LEARNERS PROGRAMME**

The Organisation of Eastern Caribbean States (OECS) Commission invites interested eligible **Consulting Firms** to submit Expressions of Interest for the provision of consultancy services to **DEVELOP AND IMPLEMENT A BRANDING AND MARKING STRATEGY FOR THE OECS/USAID EARLY LEARNERS PROGRAMME.**

The Terms of Reference and Guidelines (*please note Consultants' eligibility*) for the submission of Expressions of Interest for this consultancy are provided below.

THE ORGANISATION OF EASTERN CARIBBEAN STATES COMMISSION
EDUCATION DEVELOPMENT MANAGEMENT UNIT
OECS/USAID EARLY LEARNERS PROGRAMME

TERMS OF REFERENCE

CONSULTANCY SERVICES

FOR

**DEVELOPMENT AND IMPLEMENTATION OF A BRANDING AND MARKING
STRATEGY FOR THE OECS/USAID EARLY LEARNERS PROGRAMME**

1. INTRODUCTION

The Organisation of Eastern Caribbean States (OECS) Commission has received funding from the United States Agency for International Development (USAID) towards support for the OECS Early Learners Programme (ELP). The funding is to assist the OECS Member States in improving reading among early learners and is consistent with the USAID Education Strategy 2011-2015. The objective of the ELP is to improve the reading achievement levels of all learners at the early primary level (Grade K to Grade 3) in six (6) Member States of the OECS (*Antigua and Barbuda, Commonwealth of Dominica, Grenada, St. Kitts and Nevis, Saint Lucia and St. Vincent and the Grenadines*). The ELP will be implemented by the Project Management Team (PMT) within the Education Development Management Unit (EDMU) of the OECS Commission.

2. BACKGROUND

The OECS Education Sector Strategy (OESS) endorsed by the Council of Ministers of Education in May 2011 was accepted as the framework for educational development in Member States. With a vision of “Every Learner Succeeds,” the main purpose of the OESS is to guide the educational directions and priorities of Member States. One of the development themes of the Strategy relates to the need to improve the levels of literacy, numeracy and technology among all learners. Analyses of student performance in various national and regional examinations revealed poor performance in English and Mathematics with a declining trend in the latter. The analyses also highlighted the gender disparities in performance at all levels with male students at greater risk of lower achievement.

Poor performance in English Language and Mathematics continues to be an area of major challenge for educators and policy makers in the OECS. Concern about the low performances in the two subjects relates to the belief that the ability to read, write and count is critical for academic achievement and success on the job. Of further concern is the large and growing number of students transitioning to secondary education without the prerequisite skills to succeed

at that level. The ELP therefore seeks to address low performances through the improvement of reading at the early grades in targeted Member States.

3. REQUIREMENTS OF CONSULTANCY

In executing the ELP, a branding and marking strategy/plan is to be implemented over the remaining life of the project. The focus of the branding and marking strategy is to build continued awareness and support for the OECS vision “Every Learner Succeeds” and promote USAID’s “Goal One” which seeks to improve reading for 100 million children in primary grades. To support this initiative, the EDMU of the OECS Commission is seeking to engage the services of a consultant to produce and execute a branding and marking strategy for the ELP across the participating Member States.

4. OBJECTIVE

The objective of the assignment is to support the OECS Commission in communicating the critical messages of the early grade reading programme to key stakeholders and beneficiaries in the participating Member States, using appropriate strategies and media of communication. The ELP has developed a brand-look including a logo, a webpage on the OECS website, promotional songs and a YouTube Channel. The communications strategy is intended to strengthen the visibility of the project, contribute to image building, promote the programme and communicate the importance of improving reading abilities at an early age. The branding and marking Consultant will present and deliver a series of strategic approaches and activities to increase the awareness of targeted publics on the positive impact of good reading abilities and the potential of the Early Learners Programme for contributing to reading success in young children.

5. SCOPE OF SERVICES

The technical support of a Consulting Firm is required for developing and implementing the branding and marking strategy. The assignment involves coordinating and undertaking the following services and activities which include but are not limited to:

Branding and Marking Strategy

1. Develop and execute a Communications Strategy and Marking Plan to support implementation of the ELP. The strategy developed should be informed by the Branding and Marking Plan Guidelines provided by USAID.
2. Support the PMT in reviewing/refining the programme’s “brand look,” and theme and action strategy/plan to identify the project and make it relatable to target audiences.
3. Assist the PMT in developing key messages to give relevance to the objectives of the programme. One of the key messages proposed for the purposes of meeting the brand strategy requirements is “*Read, Learn, Grow.*” Other appropriate messages that support this message will be incorporated into appropriate communication and information products.

4. Produce an information kit that includes inserts such as flyers, fact sheets, project briefs, Facts and Questions (FAQs), news briefs and reading tips.
5. Produce and distribute a variety of broadcast, audio and visual products such as public service announcements, brochures, flyers (and any other products specified by the PMT) material etc. using traditional and new communication technologies including social media and with adequate use of the ELP songs.
6. Be responsible for developing and issuing press releases and promotional events. A series of events are to be held for media personnel to sensitize them on the ELP and get support for catalyzing a reading conscious student population in the region.
7. Work closely with and support the PMT in conceptualizing, developing and executing a programme for student involvement and participation. This entails hosting a series of reading improvement programmes, competitions and events for students in order to promote reading in Member States. The programme developed should be informed by the activities listed in the technical approach and logic model of the ELP.
8. Produce/procure and distribute memorabilia including plaques, labels, banners and other promotional materials.
9. Develop and manage an online platform with a repository of ELP resources.
10. Collaborate with relevant stakeholders and consultants to monitor and evaluate the reach and visibility of programmes of the ELP and document ELP success stories in various mediums for circulation.
11. Develop a monitoring and evaluation system in collaboration with the project's M&E consultant to report on project's reach and visibility.

Guidelines for Implementation of Strategy

1. The strategy will be implemented over the remaining life of the ELP and should continuously promote the objectives of the programme.
2. The Branding and Marking Consultant will be responsible for collaborating with relevant individuals from the EDMU and the Member States to arrange media interviews on ELP events and activities.
3. In implementing the activities in the action plan, co-branding is to be used with equal emphasis given to the OECS logo and the USAID identity.
4. Ensure communications promote USAID as the primary funder of the project and activities undertaken and goods acquired using resources from USAID funding are appropriately marked.
5. Engage as widely as possible the full gamut of media channels available to meet the objectives of the programme.
6. Collaborate with Member States to produce an audio-video series for advocacy and promotion of the ELP.

6. METHODOLOGY

The consultant will be required to review the existing literature, survey data on the project, documentation and communications strategy to arrive at a communications and marking strategy for the duration of the project. The consultant will develop a strategy which should employ a multimedia approach designed to facilitate the flow of information to and from target audiences and be driven by the following six (6) elements that will ensure the objectives of the project are realized:

- a. Refining of brand look and feel
- b. Strategic approaches
- c. Key messages to key audiences
- d. Media Mix
- e. Action Plan
- f. Monitoring and Evaluation

The selection of media activities should be informed by best practices. The approach should be to build strong relationships with Teachers, Principals, District Education Officers, Curriculum Specialists, Directors/Chief Education Officers and Ministers of Education along with the media.

The concept and the associated creative outputs developed should appropriately represent the experiences of the six (6) OECS Participating Member States, appeal to a wide-cross section of the OECS' public and reflect gender sensitivity and diversity. The Consultant will be expected to closely collaborate with the PMT, the EDMU and key stakeholders within the education sectors of the OECS Member States and undertake field work to achieve the deliverables of the branding and marking strategy.

7. DELIVERABLES

NO.	DELIVERABLES
1	Inception report and a work plan outlining the time frames on how the work will be undertaken (within the first week of commencing services)
2	A Communication Strategy and Marking plan
3	A refined brand look for the ELP to be reflected in all communication material.
4	Information kits and a series of printed materials
5	Broadcast, audio and visual products specified by the PMT
6	Produce and disseminate Audio/Visual and video resources of exemplary practices in the teaching of reading
7	An online platform to share ELP resources
8	Press releases
9	Regional and National Exposition of Teaching and Learning Resources, teacher practices and

	school grant projects in the Member States
10	A video series to document ELP best practices for communication with the media.
11	Memorabilia (inclusive of plaques, labels, banners and other promotional materials)
12	Develop and Implement Regional and National sensitization and advocacy plans
13	Quarterly Progress reports with analytics and success stories
14	Draft final report on the branding and marking strategy
15	Final report

The Consulting Firm

- A. Shall take all the necessary steps to ensure that the entrusted task is executed properly and on schedule in accordance with the established Terms of Reference;
- B. Undertake to perform the task in accordance with the Terms of Reference and according to internationally accepted standards.

8. QUALIFICATIONS AND EXPERIENCE

Consultants proposed should possess the skills, experience, qualifications and demonstrated knowledge, as detailed below, in the areas described in the scope of services above:

1. Key Expert: Communication Specialist

a. Qualifications

At minimum an undergraduate degree in Communications Studies/Mass Communication, Journalism, Marketing, Social Sciences or a related field.

b. Experience

- At least seven (7) years' demonstrated experience in the communications field and/or demonstrated experience in managing a strategic communications, media relations branding and/or marketing programme to advance development project goals and objectives.
- Experience in formulating and executing public education campaigns, strategies, promotional and informational materials.
- Demonstrated experience in video production and graphic design.
- Proven record of working with and managing multiple suppliers, producers and vendors producing a variety of communications material for awareness and visibility.
- Experience providing information and communicating messages to diverse audiences.
- Good knowledge and understanding of regional media.

c. **Competencies**

- Strong interpersonal and people skills along with excellent presentation, oral and written communication skills.
- Ability to establish good working relationships with stakeholders in a sensitive environment.
- Ability to respond quickly to requests for information and work under tight deadlines.
- Strong organizational skills, keen attention to detail and able to work independently and in a team.
- Proficiency in the use of Microsoft Office Suite and publishing software/packages is an asset.

2. **Non-key experts:**

It is also anticipated that the Consulting Firm will have access to suitable expertise in the following competencies, **particularly where the same are not resident with the Key Expert:**

- **Audio visual production** – including competencies in developing relevant graphics, applying scripts and storyboards to production, video and audio recording and editing, creative concepts for audio and visual productions, proof-reading and authenticating scripts,
- **Webmaster** - Relatable experience in creating web content, including abilities in creating social media content for Facebook, Twitter, YouTube and other social platforms.

CVs for non-key experts should not be submitted in the Expression of Interest but the Consulting Firm will have to demonstrate access to experts with the required skills.

The Consulting Firm must select and hire other experts as required according to the profiles identified in the Methodology and/or these Terms of Reference. It must clearly indicate the experts' profile so that the applicable daily fee rate in the budget breakdown is clear. All experts must be independent and free from conflicts of interest in the responsibilities they take on.

The Firm in general should have:

- Not less than 3 years overall consulting experience, with expertise in branding and marketing;
- Successfully completed at least one similar assignment;
- Experience in the Caribbean region and particularly OECS, which will be considered an advantage.

9. TERMS OF APPOINTMENT

The intended start date is **June, 2019** and the period of implementation of the contract will be no more than **fifteen (15) months** from this date.

10. REPORTING REQUIREMENTS

Reports to be delivered should reflect progress made against the scope of work, agreed work plan and deliverables, as well as any matters to be resolved. The Branding and Marking Consultant will be expected to produce a report at the end of each input, deliverable or as agreed with the EDMU. All product deliverables must include at least three (3) samples for the Project Unit to make a selection. Reports are to be presented to the Head of the OECS EDMU. All deliverable reports and documentation should be presented in draft for review before final submission. One (1) hard copy plus an electronic copy of reports and documentary materials should be submitted.

11. MANAGEMENT

The Branding and Marking Consultant will be required to report to and be supervised by the Project Coordinator. Deliverables will be monitored by the ELP project unit and reviewed by the Project Steering Committee. The Consultant is expected to attend in person the meetings agreed with the EDMU and undertake any field work necessary to achieve deliverables. The ELP PMT will facilitate the Consultant to acquire the required information and documents for completion of tasks outlined in the scope of works.

GUIDELINES FOR SUBMISSION OF EXPRESSIONS OF INTEREST

Eligibility of Consultants

For the purposes of this procurement, Consultants in the “Authorized Geographic Code” 937 are eligible for this assignment. Geographic Code 937 is defined as the United States, the cooperating/recipient countries (*Antigua and Barbuda, Commonwealth of Dominica, Grenada, St. Kitts and Nevis, Saint Lucia and St. Vincent and the Grenadines*), and developing countries **other than** advanced developing countries, and excluding prohibited sources (USAID ADS, Chapter 310). Please see Appendix A attached herewith for the list of Developing Countries-low income/lower middle income countries included in Code 937.

Geographic Code 937 has been expanded for this programme to include Barbados, Jamaica, Suriname and Trinidad & Tobago.

Also refer to <http://www.usaid.gov/policy/ads/300/310> web site for full information on Source and Nationality requirements for the procurement of commodities and services financed by USAID.

Consulting Firms are invited to indicate their interest in providing the services. Interested Consultants must provide information on their capability and suitability to undertake the assignment.

Firms interested in undertaking the prescribed Services are to email an Expression of Interest to include:

1. Information on the Consultant’s qualifications, experience and competence relevant to the assignment, including Curriculum Vitae of the proposed Key Expert for the assignment.
2. A concept note on the planned framework for undertaking the assignment.
3. Sample work including 1 piece of each of the following graphic work -
 - a poster;
 - a short video produced; and
 - a press release.

Expressions of Interest submitted should not exceed 30 pages.

The Firm shall bear all costs associated with the preparation and submission of their Expression of Interest.

The OECS is not bound to accept any Expression of Interest, and reserves the right to annul the selection process at any time prior to contract award, without thereby incurring any liability to the Consultants.

An electronic copy of the Expressions of Interest should be submitted by **8th May, 2019**, addressed to:

OECS/USAID Early Learners Programme
Attn: Head, Education Development Management Unit (EDMU)
OECS Commission
Frank Johnson Avenue, Morne Fortune
P.O. Box 179, Castries, SAINT LUCIA
Telephone: (758) 453-0669/456-0572 Fax: (758) 458-5079

At the following email address:

oeccusaidelp@oeccs.int

[copied to: procurement@oeccs.int](mailto:procurement@oeccs.int)

The email submission should include the name and address of the Consultant and shall be clearly marked in the subject line as “Expression of Interest – **Development and Implementation of a Branding and Marketing Strategy for the OECS/USAID Early Learners Programme**”.

A Consultant will be selected in accordance with the Consultant’s Qualifications (CQS) Selection method as detailed in the procedures set out in the Procurement Manual of the OECS, dated November 2013 revised June 2017.

Expressions of Interest received in relation to this assignment will be evaluated on the following:

- Technical competence in undertaking the assignment;
- Academic qualifications;
- Experience in undertaking similar assignments;
- Sample work submitted; and
- Planned framework submitted for undertaking the assignment.

The Expressions of Interest will be evaluated and the Consultant with the most relevant experience, qualifications and technical competence will be selected and requested to submit a fee proposal, which will be the basis for negotiations leading to a contract.

It is expected that the services will be conducted from June 2019 – September 2020, in keeping with the terms outlined in the Reporting Requirements above.

Enquiries regarding this EOI should be directed in writing to the above address.

ANNEX A
AUTHORIZED PRINCIPAL USAID GEOGRAPHIC CODE

Code 937 (the United States, the cooperating/recipient country, and developing countries other than advanced developing countries, but excluding any country that is a prohibited source) is the authorized USAID Principal Geographic Code for the procurement of commodities and services.

List of Developing Countries in Code 937 per ADS 310 - Low income/lower middle income

Afghanistan	Gambia, The	Myanmar
Bangladesh	Guinea	Nepal
Benin	Guinea-Bissau	Niger
Burkina Faso	Haiti	Rwanda
Burundi	Kenya	Sierra Leone
Cambodia	Korea, Dem Rep.	Somalia
Central African Republic	Kyrgyz Republic	Tajikistan
Chad	Liberia	Tanzania
Comoros	Madagascar	Togo
Congo, Dem. Rep	Malawi	Uganda
Eritrea	Mali	Zimbabwe
Ethiopia	Mozambique	São Tomé and Príncipe
Angola	India	Senegal
Armenia	Iraq	Solomon Islands
Belize	Kiribati	Sri Lanka
Bhutan	Kosovo	Sudan
Bolivia	Lao PDR	Swaziland
Cameroon	Lesotho	Syrian Arab Republic
Cape Verde	Marshall Islands	Timor-Leste
Congo, Rep.	Mauritania	Tonga
Côte d'Ivoire	Micronesia, Fed. Sts.	Turkmenistan
Djibouti	Moldova	Tuvalu
Egypt, Arab Rep.	Mongolia	Ukraine
El Salvador	Morocco	Uzbekistan
Fiji	Nicaragua	Vanuatu
Georgia	Nigeria	Vietnam
Ghana	Pakistan	West Bank and Gaza
Guatemala	Papua New Guinea	Yemen, Rep.
Guyana	Paraguay	Zambia
Honduras	Philippines	
Indonesia	Samoa	

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