



TERMS OF REFERENCE REQUEST FOR PROPOSALS TO DEVELOP A COMMUNICATIONS STRATEGY

I. Background

Established in 1985, the Eastern and Southern African Trade and Development Bank (TDB) is a multilateral, treaty-based, investment-grade development financial institution, with assets of USD 6 billion. TDB intermediates global and regional capital into Eastern and Southern Africa as a commercially minded institution with, at the core of its mandate, triple-bottom line impact imperatives.

The Bank finances and fosters trade, regional economic integration and sustainable development through trade finance, project and infrastructure finance, asset management and advisory services.

TDB has 37 shareholders, including 22 African Member States, 2 non-regional member countries, and institutional investors including the African Development Bank, People's Bank of China, OFID of OPEC, BADEA, as well as several pension funds, and insurance companies. Over the past 6 years, the Bank has enjoyed several rating upgrades, its capital and funding have increased several folds and as a result of its work, more than half of the Bank's portfolio directly and indirectly contributes to SDGs.

II. General Objective

In line with TDB's vision to be a world-class African DFI advancing the economic development, integration and prosperity of the Region, TDB is looking to design a world-class African DFI communications strategy which will act enhance TDB's brand equity and serve as a key driver of TDB's overall business strategy.

III. Specific Objectives

The specific objective of this consultancy is to develop TDB's overall 5-year communication strategy, with a more detailed focus on the next 2 years, in line with TDB's 6th Corporate Plan covering the period of 2018-2022.

While the final strategy will culminate in a series of strategic document to explain and guide its execution, the elaboration of the communications strategy will be divided in 5 parts and comprise various deliverables:

1. Foundational work upon which the strategy should be developed;
2. Communications infrastructure and institutional set-up;
3. Communications campaigning;
4. Quality control and M&E;
5. Final outputs/ strategy documents.

IV. Scope of Services, Tasks (Components) and Expected Deliverables

Deliverable 0: Inception Report

In addition to the deliverables listed below, the consultant is expected to submit an inception report, 2 weeks after the first meeting with TDB, which will include a detailed methodology and timeline to carry-out the assignment.

➔ Date of submission: two weeks after the inception meeting

1. Foundational work upon which the strategy should be developed

Deliverable 1: Comparative analysis of TDB vs. industry peers' communications departments

A comparative analysis of industry peers' communications department institutional set-up, knowledge and technology management, and communications campaigning will be done through an in-depth desk review of selected institutions. The exercise should cover:

- Institutional set-up and resources (department organograms, staff numbers and allocation and responsibilities, etc.)
- Policies in place (information disclosure, communications policy, risk mitigation, etc.)
- Communication strategies and campaigns
- Knowledge management
- Technology management

➔ Date of submission: End of Month 1

Deliverable 2: Audience segmentation

This section will consist in answering the question, who does TDB communicate to? TDB audience segmentation will consist in mapping out all the stakeholders which exist and matter in TDB's ecosystem.

➔ Date of submission: End of Month 2

Deliverable 3: Mapping of communication topics/ subject matters

This section will consist in answering the question, what does TDB communicate about and to whom?

➔ Date of submission: End of Month 2

Deliverable 4: Perceptions to be created

This section will answer the question, how do we want target audiences to perceive TDB regarding identified communication topics?

➔ Date of submission: End of Month 2

Deliverable 5: Perceptions review/ brand tracking

This exercise should be done in the format of a survey of identified target audiences. The output of the perceptions review/ brand tracking exercise, will become the basis upon which deliverable 6 will be done.

➔ Date of submission: End of Month 5 (requires completion of deliverables 2, 3 and 4)

Deliverable 6: Development of corporate and product & services messages

➔ Date of submission: End of Month 5 (requires completion of deliverable 6)

2. Communications infrastructure, knowledge and technology management, and institutional set-up

Deliverable 7: Infrastructure and systems to access data and knowledge: primary data

This deliverable consists in proposing the needed infrastructure and systems to systematically source, collect, organise and report information and data produced by TDB about its business through technology solutions and others such as a customer relationship management (CRM) system, intranet, internal databases, field visits, and other information sharing systems.

➔ Date of submission: End of Month 3 (requires completion of deliverable 1)

Deliverable 8: Infrastructure and systems to access data and knowledge: secondary data

This deliverable consists in evaluating and proposing ways to source data and knowledge from secondary sources. This will include proposing subscriptions, ways to systematically collect, organise and report this information internally. Likewise, this will also include a strategy to develop and boost TDB research capabilities, along with ways to systematically collect, organise and report research output.

➔ Date of submission: End of Month 3 (requires completion of deliverable 1)

Deliverable 9: Institutional set-up strategy to support effective communication

This deliverable will consist in proposing an institutional set-up strategy to support effective communications. This should include:

- Modification or creation of new departments or units
- Standard operating procedures (SOPs) including inter-linkages between departments linked to TDB internal and external communication needs
- KPIs – TDB-wide
- Human resource training/ capacity-building needs
- Development of relevant policies

➔ Date of submission: End of Month 3 (requires completion of deliverable 1)

3. Communications campaigning

Deliverable 10: TDB communications campaign planning

This deliverable is TDB's communications campaign covering a period of 5 years, with a more detailed focus on 2020-22, in line with and as a driver of TDB's 6th Corporate Plan. It will use as its basis deliverables 1, 2, 3, 4, 5, and 6. It should cover:

- Production of marketing collateral (printed, digital, video, voice, etc.) – Best formats/ tools of dissemination
- Public relations – Best channels of dissemination
- Media
- Corporate Social Responsibility
- Production of contents for contents for all of the above (planning of production)

➔ Date of submission: End of Month 6 (requires completion of 5)

4. Quality control and M&E

Deliverable 11: TDB Communications M&E and Quality Control systems

This deliverable consists in setting-up a system to monitor and evaluate the implementation of TDB's communication strategy and to ensure quality control.

➔ Date of submission: End of Month 7

5. Final Outputs/ Strategy Documents

Deliverable 12: Final output documents

It is to be noted that the 11 above-listed deliverables serve as milestones in the implementation of the contract associated to this RFP. Each deliverable should be approved separately. That said, all of them together compiled will serve as the basis to all final outputs which will comprise:

1. The Strategy Narrative
 2. An Implementation Logical framework
 3. An Implementation Workplan
 4. An Implementation Budget
 5. Relevant policies and other documents
- ➔ Date of submission: End of Month 7

V. Team Composition & Qualification Requirements for the Key Experts:

***All should have assumed a similar role during the past 5 years.**

***The consultant may provide any combination of staff on a team, as long as the following required roles are covered**

***Given the multidisciplinary nature of the TOR, joint ventures are permitted**

1- Team Leader and Communications Expert

Equipped with a university degree in business administration or relevant field, and a minimum of 15 years of relevant professional experience in communications and developing communication strategies, s/he will provide the overall guidance to the team of consultants and will be responsible for day to-day management of the assignment, timely completion, and quality of all deliverables. S/he will also be responsible more directly specifically for deliverables 1, 9, and 12.

2- Knowledge and Technology Management Expert

Equipped with a university degree in IT, MIS or relevant field, and a minimum of 10 years of relevant professional experience in developing information/knowledge management systems, including with CRM systems, s/he will provide the expertise for deliverable 7 and 8 in close coordination with Expert 3.

3- DFI Research Expert

Equipped with a university degree in business administration or relevant field and a minimum of 10 years of professional experience in developing research capacity for financial institutions, s/he will provide the expertise for deliverables 7 and 8 in close coordination with Expert 2.

4- PR Expert

Equipped with a university degree in communications or relevant field and a minimum of 7 years of relevant professional experience in PR, s/he will provide the expertise for deliverable 2, 3, 4, 5, 6 and 10.

5- Social Media Expert

Equipped with a university degree in communications or relevant field and a minimum of 7 years of relevant professional experience in social media campaigning, s/he will provide the expertise for deliverable 2, 3, 4, 5, 6 and 10.

6- Media Expert

Equipped with a university degree in communications or relevant field and a minimum of 7 years of relevant professional experience in media management, S/he will provide the expertise for deliverable 2, 3, 4, 5, 6 and 10.

7- Communications M&E Expert

Equipped with a university degree in communications or relevant field and a minimum of 7 years of relevant professional experience in M&E in the communications space, s/he will provide the expertise for deliverable 11.

8- Data collection and survey solutions Expert

Equipped with a university degree in communications or relevant field and a minimum of 7 years of professional experience conducting surveys. s/he will provide the expertise for deliverable 5, in close coordination with Experts 4, 5 and 6.

VI. Timeline of the project

7 months

VII. Proposals should comprise

- A) A Technical Proposal including: 1) Consultant's organization and experience summary 2) Technical approach and methodology, and team organisation (narrative): this should explain the consultant's understanding of the TOR, and the detailed technical approach and methodology to achieve deliverables and make references to workplan and staffing. 3) Workplan (table): plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals of deliverables by the Client), and tentative delivery dates of the deliverables. 4) Staffing (table + narrative): structure and composition of the consultant's team, including the list of the key and non-key experts and other required staff, number of work days each per deliverable 5) Company CV and adequacy for assignment, including in a separate table: relevant assignments, the duration of relevant assignments, name and description, name of client and country of assignment, value of contract, and role in the assignment. Assignments completed by the consultant's individual exports cannot be claimed as the relevant experience of the consultant. 6) Full Staff CVs including in a separate table: relevant assignments, the duration of relevant assignments, name and description, name of client and country of assignment, contact person value of contract, and activities performed during the assignment.
- B) Financial proposal (detailed budget in a table) in USD

VIII. Submission

Proposals should be sent before the **27th of January 2020** by email to : procurement@tdbgroup.org with as subject **TDB Communications Strategy Proposal** .

Questions can be sent by email to anne-marie.iskandar@tdbgroup.org until the **15th of January 2020 only**.

***Disclaimers:** TDB Group reserves the right to independently verify submitted documents, listed clients and similar works. TDB Group is not obliged to give reason for not selecting any persons/ firm. TDB Group reserves the right to discontinue this process without reference to any entity.*