

Business Finance for the Poor in Bangladesh (BFP-B) Project

Request For Proposals

for

Procurement of Consultancy Services

Subject of procurement: Consultancy services for undertaking knowledge management, communications and stakeholder engagement for the Business Finance for the Poor Bangladesh programme on a national and international level

November, 2017

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Section 1. Letter of Invitation

BFP-B Letter Head

[insert: Name and Address of Consultant]

Dated:XX XXXX 2017

Attention: Mr./Ms.:

Letter of Invitation

1. Business Finance for the Poor in Bangladesh (BFP-B) is a five-year programme funded by UKaid from the UK government. Bangladesh Bank is the implementing agency, and the Bank and Financial Institutions Division of the Ministry of Finance, the executing agency. Nathan Associates London Ltd. has been appointed as the management agency for the programme.
2. BFP-B Project now invites proposals for ***‘Consultancy services for Undertaking knowledge management, communications and stakeholder engagement for the Business Finance for the Poor Bangladesh programme on a national and international level’***. Details on the services are provided in Section 5 ‘Terms of Reference’ of the Request for Proposal attached herewith.
3. Your Firm/Organisation/Consortium/Joint Venture has been shortlisted to present a proposal for the above consulting services. It is not permissible to transfer this invitation to any other organisation.
4. It is expected that up to two firms will be selected under the QCBS Selection Method and Procedures described in this RFP, in accordance with the UKaid/DFID procurement policy.
5. The RFP includes the following documents:
 - Section 1 - Letter of Invitation
 - Section 2 - Instructions to Consultants
 - Section 3 - Technical Proposal - Sample Forms
 - Section 4 - Financial Proposal - Sample Forms
 - Section 5 - Terms of Reference
6. Please inform us through email (attached scanned letterhead of your organisation with signature), within three working days of receipt:
 - (a) that you received the Letter of Invitation; and
 - (b) whether you will submit a proposal alone or in association,

to the following email addresses:

Katherine Hughes
Programme Manager (BFP-B)
Nathan Associates London Ltd.
Email: khughes@nathaninc.com

Shamira Mostafa
Challenge Fund Coordinator
BFP-B Project
5th Floor, House 13, Road 34,
Gulshan-2, Dhaka-1212.
Email: smostafa@nathaninc.com
Website: www.bfp-b.org.

Yours sincerely,

On behalf of Nathan Associates London Ltd.
Feisal Hussain
Team Leader
BFP-B Project

Section 2. Instructions to Consulting/Research Firms

<p>RFP Submission Deadline</p>	<p>Applicants will be given a total of 7 days from the date of RFP notice for submission of a detailed Proposal. The Proposal may be submitted in hard copy or soft copy (via email) on 16th December, 2017 by 5:00 pm. For hard copy submission, the address is:</p> <p>BFP-B Project 5th Floor, House 13, Road 34, Gulshan-2, Dhaka-1212</p> <p>Soft copies must be emailed to: smostafa@nathaninc.com</p>
<p>Methods for Procurement of Consultancy Services</p>	<p>The Consultant (Consulting Firm) shall be selected in accordance with the Quality and Cost-Based Selection (QCBS) method by following the procurement guidelines of UKaid/DFID. The QCBS processes will follow (i) the quality of the Proposal; and (ii) the cost of the Services. 70% weight will be given for the Technical Proposal and 30% weight will be given for the Financial Proposal. Technical proposals achieving 70% of the total technical score will be put through for assessment of financial</p>
<p>Technical Proposal</p>	<p>The Technical Proposal to be prepared according to the format and Terms of Reference (ToR) provided in this RFP document.</p>
<p>Financial Proposal</p>	<p>Applicants should submit their financial proposal according to the format. The financial proposal should include fees of the experts, field data collection costs, if required; transportation, food and local accommodation costs of the experts, logistics and administrative expenses, and other expenses.</p> <p>It should also demonstrate how the financial proposal offers best value for the BFP-B programme. This should also set out the governance, management methodology or process for managing risks & issues to provide confidence that the business processes are sufficiently robust to ensure effective delivery on time and within budget.</p>
<p>Currency</p>	<p>The financial proposal is to be submitted in Pound Sterling (GBP). BFP-B Project/ Nathan Associates London Ltd will not be responsible for exchange rate risks. Any exchange rate risks will be borne by the Consultant (Consulting Firm).</p>
<p>RFP Submission</p>	<p>For QCBS process, the applicants should submit proposals in two parts – Technical and Financial. For soft copy, please attach two separate files. For hard copy submission, in a sealed envelope marked as ‘Submission of RFP’, inside which should be two inner envelopes, one envelope containing the Applicant’s Technical Proposal without any reference to price</p>

	and the second envelope containing the Applicant's Financial Proposal, both clearly marked.
Presentation of the Technical Proposal	If the Proposal Evaluation Committee deems the requirement for a presentation of the Technical Proposal, then the Consultant (Consulting Firm) shall be invited for a presentation.
Proposal Evaluation	An Evaluation Committee will evaluate the Proposals. The decision of the proposal Evaluation Committee will be considered as final. BFP-B Project reserves the right to accept or reject any or all Proposals. All applicants will be informed about the result via email.
Contract Negotiation	<p>BFP-B Project/Nathan Associates London Ltd. will negotiate a contract with the successful Consultant only on the following components of the Proposal submitted by the Consultant:</p> <ul style="list-style-type: none"> (a) Methodology; (b) Work plan and activity schedule; (c) Organisation and staffing; (d) Deliverables; (e) Reimbursable expenses, if there are any. However, it is recommended that the Consultant shall include all expenses in the financial proposal. <p>If negotiations with the successful Consultant fail, then BFP-B Project/Nathan Associates London Ltd. shall have the right to reject the successful Consultant, and either seek fresh proposals, negotiate further with one or more of the bidders, defer the award of a contract or cancel the competition and make no contract award, if appropriate.</p>
Contract Award	<p>On behalf of the BFP-B Project, Nathan Associates London Ltd. will award a contract to the successful Consultant. The standard contract format of Nathan Associates London will be followed. On behalf of Nathan Associates London Ltd., the Director will sign the Contract. On behalf of the Consultant, the Head of the Consulting Firm or Consultant himself/herself (for Individual Consultancy agreement) will sign the Contract.</p> <p>The consultant or Consulting Firm will also be subject to a due diligence assessment prior to contracting.</p>
Professional Liability of the Consultant/Consulting Firm	The Consultant/Consulting firm is expected to carry out assignments with due diligence and in accordance with prevailing professional standards. The Consultant/Consulting firm shall be held liable for all losses or damages suffered by the Procuring Agency on account of any misconduct and unsatisfactory performance by the Consultant/Consulting firm in performing the consulting services. The Consultant/Consulting firm shall not share the information or data collected and the report prepared for the assignment to any third party without prior written approval of the Procuring Agency.

Payment	On behalf of the BFP-B Project, Nathan Associates London Ltd. will pay the Consultant in Great Britain Pound (GBP) based on delivery of the agreed outputs according to an agreed timetable. The payment will be made in instalments based on satisfactory delivery and approval of deliverables.
VAT and Taxes	The Consultant (Consulting Firm) will be responsible to pay VAT and Taxes according to Bangladesh Government policy.
Company Information and due Diligence	<p>Please note that Nathan will be unable to engage your firm to work under any sub-contractor agreement on a consultancy basis without company information being provided in the form TECH 11 below.</p> <p>In order to ensure Nathan's continuing legal compliance, Nathan requires its prospective partners to complete a due diligence questionnaire. Please provide answers to the questions in the form TECH 11 (as applicable) and documents where requested. Please do not hesitate to contact us if you require any assistance in completing this questionnaire. If there are any relevant changes in responses/circumstances, you must report them to Nathan immediately.</p>

Section 3 Technical Proposal - Sample Forms

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Form TECH-1: Technical Proposal Submission Form

[Location, Date]

To: Ms. Katherine Hughes
Programme Manager (BFP-B)
Nathan Associates London Ltd.

And

Ms. Shamira Mostafa
Challenge Fund Coordinator
BFP-B Project
5th Floor, House 13, Road 34,
Gulshan-2, Dhaka-1212.

Dear Madam:

I/We, the undersigned, offer to provide the consulting services for ***'Consultancy services for undertaking knowledge management, communications and stakeholder engagement for the Business Finance for the Poor Bangladesh programme on a national and international level,'*** in accordance with your Request for Proposal dated [Insert Date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and a Financial Proposal sealed under separate sealed envelopes.

We are submitting our Proposal as a [Consortium/Joint Venture/in association with (please delete as appropriate)]: [insert a list with full name and address of each Consortium/Joint Venture partner or sub-Consultant]. Attached is the following documentation: [Consortium/Joint Venture Agreement and Consortium/Joint Venture power of attorney for lead or managing Partner (please delete as appropriate)].

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake that, if our Proposal is accepted, we will start the assignment within 1 day after signing the contract.

We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Authorised Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

Form TECH-2: Conflict of Interest Declaration Form

I am declaring that (please give tick-mark)-

a) I or our Firm do not have any connection with the BFP-B Project

b) I or our Firm have a connection with the BFP-B Project.

If the Consulting Firm and/or any of the Team Members have a connection with the BFP-B Project, then the Firm or respective Team Member has to complete following conflict of interest form:

Name of the Team Member:

Type of involvement with the BFP-B Project:

I hereby declare that being involved with the BFP-B Project, I will not influence in the decision making during the RFP evaluation process and any other procurement process of BFP-B Project. BFP-B Project will have the right to reject our Proposal, if I try to influence in the procurement process and/or RFP evaluation process.

Authorised Signature [In full and initials]:

Name and Title of Signatory:

Date:

Name of Firm:

Address:

Form TECH-3: Non-Disclosure Agreement

The Consulting Firm will receive and generate Confidential Information in the pursuit of its stated goals. All individuals associated with this project from the Consulting Firm will hold all such Confidential Information in the strictest confidence and not disclose or use it, unless prior agreement to do so has been given by the BFP-B Team Leader in conjunction with the DFID Project Officer.

All individuals must take reasonable precautions to ensure that all Confidential Information received is stored in a secure and proper manner. Any documents received during the BFP-B review process should be considered absolutely confidential. This means that no photocopies should be made of the documents and the documents should remain under control of the participant/reviewer at all times. At the conclusion of the review the documents should be returned intact to the BFP-B Challenge Fund Manager. Neither the contents of the documents nor the review process should be discussed with anyone outside the BFP-B project team.

In Agreement whereof, I undertake to acknowledge the need for ensuring confidentiality in the BFP-B process, in a manner which safeguards the confidentiality of all conversations, papers, conversations, review processes and procedures at all times. I also undertake not to disclose or to place the documents in a position where their contents might be subject to review by a person who is not part of the BFP-B process.

Yours sincerely,

Authorised Signature [*In full and initials*]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

Form TECH-4: Consultant's Organisation (1-page limit)

[Provide here a brief description of the background and organisation of the Consultants and, if applicable, each Consortium/Joint Venture partner for this assignment. Please indicate the number of relevant projects and at least 5 years' experience in the field of communications. Experience working with mass-media and social media, knowledge of inclusive finance, experience in project management, and production and oversight of document and report development and print and electronic publishing is also required. Experience in branding, media relations, graphic design and video production is desirable].

Form TECH-5: Comments and Suggestions on the Terms of Reference (1-page limit)

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as suggesting alternative approaches, activities or sequencing). Such suggestions should be concise and to the point, and incorporated in your Proposal.]

Form TECH-6: Description of Approach, Methodology and Work Plan for Performing the Assignment (7 pages limit)

[Technical approach, methodology and work plan are key components of the Technical Proposal. It is suggested that you present your Technical Proposal (maximum 7pages, excluding Annex) divided into the following three chapters:

- a) Technical Approach and Methodology,*
- b) Work Plan, and*
- c) Organisation and Personnel,*

a) Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should include any dependencies your suggested methodologies rely on, e.g. provision of certain information and contacts. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the ToR and ability to translate them into a feasible working plan. A list of the final documents, including reports, figures and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-10.

c) Organisation and Personnel. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key experts responsible, and proposed technical and support personnel. You shall also specify if you will be the lead firm in a Consortium/Joint Venture or in an association with Sub-Consultants. For Consortium/Joint Ventures, you must attach a copy of the Consortium/Joint Venture agreement.]

Form TECH-8: Curriculum Vitae (CV) for Proposed Experts (to be included as ANNEX-B in the Technical Proposal)

1. Proposed Position: _____

2. Name of Firm [*insert name of firm proposing the expert*]: _____

3. Name of Expert [*insert full name*]: _____

4. Date of Birth: _____ Nationality: _____

5. Education [*indicate college/university and other specialised education of expert, giving names of institutions, degrees obtained, and dates of obtainment*]: _____

6. Membership in Professional Associations: _____

7. Other Training [*indicate significant training since degrees under 5 - Education were obtained*]:

8. Countries of Work Experience: [*list countries where expert has worked in the last ten years*]:

9. Languages [*For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing*]: _____

10. Employment Record [*Starting with present position, list in reverse order every employment held by expert since graduation, giving for each employment (see format here below): dates of employment, name of employing organisation, positions held.*]:

From [Year]: ____ To [Year]: _____

Employer: _____

Positions held: _____

11. Detailed Assigned Tasks	12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned
<p><i>[List all tasks to be performed under this assignment]</i></p>	<p>Name of assignment or project: _____ Year: _____ Location: _____ Client: _____ Main project features: _____ Position held: _____ Activities performed: _____</p>

13. Certification:

I, the undersigned, certify to the best of my knowledge and belief that

- (i) This CV correctly describes my qualifications and my experience;
- (ii) In the absence of medical incapacity, I will undertake this assignment for the duration and in terms of the inputs specified for me in the Personnel Schedule in Form TECH-7 provided team mobilisation takes place within the validity of this proposal or any agreed extension thereof;
- (iii) I am committed to undertake the assignment within the validity of Proposal;
- (iv) I am not part of the team that wrote the terms of reference for this consulting services assignment;
- (v) I am not sanctioned/debarred (ineligible for engagement) by DFID.

I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

_____ Date: _____

*[Signature of expert or authorized representative of the firm]*¹

Day/Month/Year

Full name of authorized representative: _____

1 This CV can be signed by an authorized representative of the Consultant provided that if the Consultant's proposal is ranked first, a copy of the CV signed by the expert and/or specialist must be submitted to the Client prior to the commencement of contract negotiations.

Form TECH-9: Personnel Schedule ¹

(to be included as ANNEX-C in the Technical Proposal)

N°	Name of Expert /Position	Professional Expert input (in the form of a bar chart) ²														Total input (Days)		
		Weeks	1	2	3	4	5	6	7	8	9	10	11	12	n	Home	Field ³	Total
1			[Home] [Field]															
2																		
3																		
n																		
											Subtotal							
											Total							

1. Weeks are counted from the start of the assignment. For each expert, indicate separately the input for home and field work.
2. Field work means work carried out at a place other than the expert's home office; i.e. normal place of business.

Full time input
 Part time input

Form TECH-10: Work Schedule (Weekly)

(to be included as ANNEX-D in the Technical Proposal)

N°	Activity ¹	Weeks ²												
		1	2	3	4	5	6	7	8	9	10	11	12	n
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
n														

- 1 Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports)
- 2 Duration of activities shall be indicated in the form of a bar chart.

Section 4. Financial Proposal - Sample Forms

Form FIN-1: Financial Proposal Submission Form

Form FIN-2: Summary of Costs and Financial Methodology

Form FIN-1: Financial Proposal Submission Form

[Location, Date]

To: Ms. Katherine Hughes
Programme Manager (BFP-B)
Nathan Associates London Ltd.

And

Ms. Shamira Mostafa
Challenge Fund Coordinator – BFP-B
BFP-B Project
5th Floor, House 13, Road 34,
Gulshan-2, Dhaka-1212.

Dear Madam:

I/We, the undersigned, offer to provide the consulting services for '**Consultancy services for Undertaking financial and administrative due diligence of shortlisted candidates of the Business Undertaking knowledge management, communications and stakeholder engagement for the Business Finance for the Poor Bangladesh programme on a national and international level**' in accordance with your Request for Proposal dated [insert Date] and our Technical Proposal. Our attached Financial Proposal is for the sum of [insert amount(s) in words and figures¹].

We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Authorized Signature [In full and initials]: _____
Name and Title of Signatory: _____
Name of Firm: _____
Address: _____

Form FIN-2: Summary of Costs and Financial Methodology

Cost items	Units	Unit cost	Total (in GBP)
Inputs of the Experts (Fees/Days)			
a. Team Leader			
b. Other Expert/Team member (Please provide Position)			
c. Other Expert/Team member (Please provide Position)			
d. Other Expert/Team member (Please provide Position)			
etc.			
Logistics			
(Transport inside Dhaka)			
(Transport outside Dhaka)			
Accommodation for field trip			
Per diem for field trip			
Total Estimated Cost (in GBP)			

Notes:

- a) The consultant or consulting firm needs to prepare a budget or cost estimate according to the above format. b) If required, consultant or consulting firm shall provide a separate detail budget.

In addition to the financial tables the Tenderer should **provide up to a maximum of 4 pages** that aim to provide convincing information in the following areas of their Financial Methodology:

- **Benchmarking of Fee Rates:** We expect bidders to clearly set out their own process of benchmarking Fee Rates to demonstrate competitiveness. This approach is increasingly important as DFID moves to a position where suppliers are expected to be transparent in their pricing structure in order to demonstrate that their Commercial Tender is competitive and represents Value for Money. Tenderers should therefore provide details of how their Fee Rates are constructed, detailing the overhead, salary and profit margin making up each Fee Rate.
- **Financial Risk/Contingency Costs:** It is a matter for Tenderers to determine if they wish to include contingency elements in their Tender. If for example, you have identified risks to successful delivery, which would require additional resource or cost to mitigate, then we would expect these to be shown separately in the Tender

- *Economies of Scale:* The Tender should highlight any particular Economies of Scale that can be realised through sharing of resources with other operations the Tenderer is currently involved in. The Tender should explain how these benefits can be realised and clearly demonstrate that they are realistic.

Section 5 Terms of Reference

Request for Proposal

Consultancy services for Undertaking knowledge management, communications and stakeholder engagement for the Business Finance for the Poor Bangladesh programme on a national and international level

1. Project Background

Business Finance for the Poor in Bangladesh (BFP-B) is a five-year programme funded by UK aid from the UK government, started in October 2013. The Bangladesh Bank (BB), the central bank of Bangladesh, is the implementing agency, and the Bank and Financial Institutions Division (BFID) of the Ministry of Finance (MoF), Government of Bangladesh (GoB), is the executing agency. Nathan Associates London Ltd, in consortium with its partner, Oxford Policy Management (OPM), is appointed as the management agency for the programme.

The programme aims to promote **innovative finance and financial services for micro and small enterprises (MSEs)**. It is designed to couple social and economic welfare objectives through a making markets work better for the poor (M4P) approach to increase access to finance for MSEs, especially those that are currently underserved by the formal financial sector. BFP-B has two components: a Challenge Fund and Policy research and advocacy. Two additional components – a Microfinance Credit information bureau and a credit guarantee facility are under negotiation.

2. Background of Programme communications and advocacy

The policy component of BFP-B has conducted numerous diagnostic studies, which now need to be translated into policy and regulatory reform. This will require intense stakeholder engagement and communication by deploying professional communication capability using both above-the-line and below-the-line communication channels to generate ownership and momentum.

The project has developed a 3-dimensional communication strategy that will ensure the visibility of BFP-B project's work in digital media, electronic media and print media. Subsequently, the project has already set up its Facebook, LinkedIn and twitter accounts. However, managing these kinds of digital media profiles requires additional resourcing with a specific skillset.

The project has also developed a comprehensive strategy for promoting the Challenge fund and its projects for further crowding in by other financial eco sector actors. This requires production of high quality communication materials and publication of those high-quality communication pieces in different effective print and electronic media, and

engagement of relevant stakeholders through the organization of various interactive events.

Additionally, the project is now in a position to investigate and develop success stories on the models of financial innovations and pro-poor impact pieces on beneficiary's and communicate these to a wide range of stakeholders through various mediums.

3. Purpose of the assignment

Under the direction and supervision of the BFP-B Team Leader the Consultant/consulting firm will work to strengthen BFP-B's knowledge management, communication, stake holder engagement, policy advocacy and brand awareness among stakeholders in Bangladesh and internationally.

4. Objective of the assignment

The consultant/consulting firm will play an important role in:

- Managing the communications of the programme on a national level and international level
- Strengthen BFP-B's knowledge management processes
- Manage and create social media content
- Manage the BFP-B Newsletter, coordinating and creating content

5. Scope of the assignment

The assignment should cover the following key activities:

Manage communications effort of the programme on a national level and at an international level:

- Draft press releases and news announcement of BFP-B activities;
- Develop and maintain a list of relevant media contacts on a national and international levels by liaising with the team and partners;
- Disseminate press releases and news announcement through a list of partner sites and monitor the outreach of the press releases and announcement;
- Assist in the production and updating of BFP-B presentations;
- Assist in the production of tools such as banners, brochures, welcome packages etc. for events;
- Ensure correct usage of partner branding

Contribute to strengthening the BFP-B's knowledge management:

- Update the programme web-site including redesign and upload of information and knowledge products produced by the programme;

- Feed general and targeted stakeholders with regular information on the evolution of the programme based on the programme’s communication plan and activities;
- Manage and encourage exchanges inside the community of practice through online tools;
- Maintain contact list.
- Facilitate BFP-B team members to actively contribute to knowledge content.

Social Media Management & Content Creation:

- Expansion of BFP-B’s social media presence;
- Effectively manage the social media presence of the programme to strengthen the BFP-B’s brand awareness and to provide visibility to the programme’s knowledge management activities and outputs (publications and videos);
- Draft blog post and coordinate the writing of blog post by team members, consultants or partners of the programme;
- Write engaging content for the various social media channels of the programme;
- Boost followers and engagement on Twitter, LinkedIn, Facebook and other relevant channels;
- Keep abreast of social media trends and identify new opportunities to increase the visibility of BFP-B’s work on online platforms;
- Increase in-house social media usage, by suggesting sample posts and training Staff;
- Coordinate the development of campaign assets such as snapshots of publications, infographics and animations;
- Produce evaluation reports on the impact of BFP-B’s communications activities on social media platforms. Report on developments, trends and attitudes regarding key components of BFP-B.

Newsletter Management & Content Curation and Creation:

- Produce BFP-B’s e-newsletter, including writing, editing, gathering information from BFP-B team and partners, formatting and sending it out to subscribers.
- Monitor content produced by third parties related to BFP-B programme components;
- Ensure curated content is available on the relevant online tools created by the programme;
- Compile relevant content in social media tools to be disseminated to BFP-B Partners and other interested audiences.
- Manage the list of subscribers with the support of the BFP-B, coordinate the management of multiple contact list and potential subscribers;
- Explore/hire event management for any kind of workshop/ Seminar of BFP-B.

6. Expected Output/Deliverables

Deliverable	Frequency
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Manage communications effort of the programme on a national level and at an international level:	
<ul style="list-style-type: none"> • Draft press releases and news announcement of BFP-B activities in coordination with the BFP-B team; 	at least 2 items per month
<ul style="list-style-type: none"> • Develop and maintain a list of relevant media contacts on a national and international levels by liaising with the team and partners; 	one-off
<ul style="list-style-type: none"> • Disseminate press releases and news announcement through a list of partner sites and monitor the outreach of the press releases and announcement; 	at least 2 items per month
<ul style="list-style-type: none"> • Template development for presentations, brochures, case studies, and other relevant communications tools 	one-off
<ul style="list-style-type: none"> • Assist in the production of visually stimulating BFP-B presentation decks; 	average 2 per month (on a needs basis)
<ul style="list-style-type: none"> • Assist in the production of tools such as banners, brochures, welcome packages etc. for events; 	In line with events calendar (approx 1 per month)
<ul style="list-style-type: none"> • Support the writing of case studies 	at least 2 per quarter
Contribute to strengthening the BFP-B's knowledge management:	
<ul style="list-style-type: none"> • Update the programme web-site including redesign and upload of information and knowledge products produced by the programme; 	Monthly
<ul style="list-style-type: none"> • Generate and update a list of target audiences for communications according to appropriate social media channels and print/electronic media channels 	6-monthly
<ul style="list-style-type: none"> • Deliver messages through appropriate social media channels on BFP-B 	10 posts per month
<ul style="list-style-type: none"> • Deliver messages through appropriate print/electronic media channels on BFP-B 	2 publications per month
Social Media Management & Content Creation:	
<ul style="list-style-type: none"> • Effectively review and manage the social media presence of the programme to strengthen the BFP-B's brand awareness and to provide visibility to the programme's knowledge management activities and outputs (publications and videos); 	bi-weekly

<ul style="list-style-type: none"> • Coordinate the writing of blog post by team members, consultants or partners of the programme; 	at least 2 posts per month
<ul style="list-style-type: none"> • Boost followers and engagement on Twitter, LinkedIn, Facebook and other relevant channels; 	targets to be discussed during planning
<ul style="list-style-type: none"> • Development of campaign assets such as snapshots of publications, infographics and animations; 	2 per month
<ul style="list-style-type: none"> • Increase in-house social media usage, by suggesting sample posts and training Staff; 	one-off with refresher after 3 months
<ul style="list-style-type: none"> • Produce evaluation reports on the impact of BFP-B's communications activities on social media platforms. Report on developments, trends and attitudes regarding key components of BFP-B. 	Quarterly
<ul style="list-style-type: none"> • Develop video documentary and edit existing BFP-B videos 	need based
Newsletter Management & Content Curation and Creation:	
<ul style="list-style-type: none"> • Produce BFP-B's e-newsletter, including writing, editing, gathering information from BFP-B team and partners, formatting and sending it out to subscribers. 	monthly
<ul style="list-style-type: none"> • Monitor content produced by third parties related to BFP-B programme components; 	weekly
<ul style="list-style-type: none"> • Manage the list of subscribers with the support of the BFP-B, coordinate the management of multiple contact list and potential subscribers; 	monthly

7. Schedule of the assignment

Estimated start date: December 2017

Estimated end date: September 2018

The schedule of assignment will be finalised upon signing of the contract by BFP-B Project/Nathan Associates London Ltd.

8. Reporting

The BFP-B Team Leader will be the primary contact and will provide the consultant/consulting firm with overall strategic and technical guidance.

Experience:

- A minimum of ten (10) years' experience in particularly in the field of communications;
- Experience in working with mass-media;
- Website design and management experience
- Experience in branding, communications and experience in media relations, graphic design and video production;
- Experience in project management;
- Experience in overseeing document and report production, print and electronic publishing;
- Photographic skills
- Knowledge of inclusive finance, experience is an advantage

Form TECH-11: Company Information and Due Diligence

SUB-CONTRACTOR FIRM INFORMATION FORM

Please note that Nathan will be unable to engage your firm to work under any sub-contractor agreement on a consultancy basis without this information being provided.

COMPANY DETAILS		
Company name:		
Registered address:		
Country of registration:		
Company registration number:		
Date of registration:		
VAT registration number:		
Trading status:	(e.g. public limited company / limited company / limited liability partnership / other partnership / sole trader / cooperative / company limited by guarantee)	
Board of directors	• List name(s) of directors	
Number of permanent staff		
Name contact person:		
Contact email address:		
Contact telephone numbers:	Direct Dial:	
	Switchboard:	
	Other:	
<i>Please supply a copy of your company registration certificate.</i>		

BANKING DETAILS FORM

Please note that Nathan will be unable to engage your firm to work under any sub-contractor agreement on a consultancy basis without this information being accurately provided.

For non-UK account holders

BANKING DETAILS – Non-UK accounts	
Beneficiary account number:	
Beneficiary name:	
Beneficiary address:	
Beneficiary bank SWIFT:	
Beneficiary bank name:	
Beneficiary bank address:	
Currency of account:	

INTERMEDIARY DETAILS	
Intermediary bank name:	
Intermediary branch address:	
Account no:	
Additional Information:	

For UK account holders

BANKING DETAILS – UK accounts	
Beneficiary bank name:	
Beneficiary branch name:	
Beneficiary name:	
Beneficiary account number:	
Beneficiary sort code number:	
Currency of account:	

DUE DILLIGENCE FORM

In order to ensure Nathan's continuing legal compliance, Nathan requires its prospective partners to complete a due diligence questionnaire. Please provide answers to the questions below (as applicable) and documents where requested. Please do not hesitate to contact us if you require any assistance in completing this questionnaire. If there are any relevant changes in responses/circumstances, you must report them to Nathan immediately.

In signing this declaration, I signify that I understand and agree to abide by the conditions set out in this document. I understand that if I fail to abide by these conditions, the contract may be terminated.

NAME OF COMPANY	
NAME OF SIGNATORY	
TITLE	
EMAIL ADDRESS	
SIGNATURE	
DATE	

A. Conflict of interest

Disclose details of any financial, personal, business or professional activities or connections which might have the potential to give rise to a conflict of interest with your organisation in connection with the project, the client, the recipient of services, and Nathan. If there is a potential conflict of interest, please state how this conflict of interest could be avoided.
<i>[Insert response]</i>

B. Legal compliance

Civil liabilities	YES	NO
In the last five years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, been the subject of any civil action relating to your professional or business activities which has resulted in a finding against you by a court, or a settlement (other than a settlement consisting only of the dismissal by consent of a claim against it and the payment of its costs) being agreed? <i>If so, give particulars.</i>		
Good reputation and character	YES	NO
<i>Note: There is no need to mention offences which are spent for the purposes of the Rehabilitation of Offenders Act 1974, offences committed before the age of 17 (unless committed within the last ten years) or any road traffic offence that did not lead to a prison sentence.</i>		
1. Have you/your organisation/any other person who has powers of representation, decision or control in the organisation at any time pleaded guilty to or been found guilty of any offence? <i>If so, give details of the court which convicted you, the offence, the penalty imposed and date of conviction.</i>		

2.	<p>Have you/your organisation/any other person who has powers of representation, decision or control in the organisation ever been disqualified by a court from being a director, or from acting in the management or conduct of the affairs of any company? <i>If so, give particulars.</i></p>		
3.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been refused the right or been restricted in the right to carry on any trade, business or profession for which a specific licence, registration or other authority is required? <i>If so, give particulars.</i></p>		
4.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been investigated about allegations of misconduct or malpractice in connection with your professional activities which resulted in a formal complaint being proved but no disciplinary order being made? <i>If so, give particulars.</i></p>		
5.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been the subject of disciplinary procedures by a professional body or employer resulting in a finding against you? <i>If so, give particulars.</i></p>		
6.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been reprimanded, excluded, disciplined or publicly criticised by any professional body which you belong to or have belonged to? <i>If so, give particulars.</i></p>		
7.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been refused entry to or excluded from membership of any profession or vocation? <i>If so, give details.</i></p>		
8.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been dismissed from any office (other than as auditor) or employment or requested to resign from any office, employment or firm? <i>If so, give particulars.</i></p>		
9.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been reprimanded, warned about future conduct, disciplined, or publicly criticised by any regulatory body, or any officially appointed enquiry concerned with the regulation of a financial, professional or other business activity? <i>If so, give particulars.</i></p>		
10.	<p>In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation, in the United Kingdom, or elsewhere, ever been the subject of a court order at the instigation of any regulatory body or any officially appointed enquiry concerned with the regulation of a financial, professional or other business activity? <i>If so, give particulars.</i></p>		
11.	<p>Are you/your organisation/any other person who has powers of representation, decision or control in the organisation currently undergoing any investigation or disciplinary procedure as described in 3-8 above? <i>If so, give particulars.</i></p>		

C. Financial compliance

Financial integrity and reliability		YES	NO
1.	In the last ten years have you/your organisation/any other person who has powers of representation, decision or control in the organisation made any compromise arrangement with your creditors or otherwise failed to satisfy creditors in full? <i>If so, give particulars.</i>		
2.	Have you/your organisation/any other person who has powers of representation, decision or control in the organisation ever been declared bankrupt or been the subject of a bankruptcy court order in the United Kingdom, or elsewhere, or has a bankruptcy petition ever been served on you? <i>If so, give particulars.</i>		
3.	Have you/your organisation/any other person who has powers of representation, decision or control in the organisation ever signed a trust deed for a creditor, made an assignment for the benefit of creditors or made any arrangements for the payment of a composition to creditors? <i>If so, give particulars.</i>		
<p><i>Please provide as a separate attachment (for companies only):</i></p> <ul style="list-style-type: none"> <i>A copy of your accounts for the most recent two years. If required, audited version.</i> 			

D. Details of insurance policies

Subcontractor firms are required to have sufficient insurance policies in place. It is important to note that appropriate levels of insurance may differ between regions and/or type of project.

Type of policy	Insurer	Limit of liability (per occurrence and aggregate and excess)	Expiry date
Employers liability			
Public liability			
Professional indemnity			
Travel insurance, incl. medical cover			
<i>Please provide details of all insurance policies that you have in place, and provide copies of insurance certificates as attachments.</i>			

E. Details of company policies

Subcontractor firms are required to apply the policies detailed below. If you do not have your own policy, we will then expect you to commit and sign to Nathan's internal policy and procedures. Please note that we might request to see the relevant policy document at any time.

Type of policy	YES	NO
Corruption and anti-bribery policy		
Duty of care and security policy		
Environmental policy		
Equality and diversity policy		
Health and safety policy		
Trafficking policy		
IT and data protection policy		