# Terms of Reference

#  Marketing Strategy Development for SWEEP services in Chattogram

## Introduction

Water & Sanitation for the Urban Poor (WSUP) is a not-for-profit company that helps transform cities to benefit the millions who lack access to water and sanitation. We work in six countries in sub-Saharan Africa and Asia, supported by an office in the UK. Since inception we have helped nearly 19 million people gain access to better water, sanitation and hygiene (WASH) services.

Since 2008, WSUP has been a trusted partner of utilities, municipalities and the private sector in urban Bangladesh, supporting them to develop WASH services, build infrastructure and attract funding to help them reach low-income communities (LICs). Low-Income Communities in urban Bangladesh are defined by WSUP as “*Any customer, or community member, residing in an area that has been defined as an urban slum by the Bureau of Statistics in Bangladesh*”. We work with utilities and businesses to develop services which generate revenue whilst reaching the most vulnerable urban residents, and we advise regulators and governments on how to create an environment which enables businesses to succeed.

To address the lack of faecal sludge management services in Bangladeshi cities, in 2015 WSUP developed the SWEEP business model; an inclusive, fee-based and safe faecal sludge collection, transport and disposal service, provided by local enterprises to the urban population of Bangladesh.

SWEEP services are enabled through an innovative public-private-partnership (PPP) between city authorities mandated to provide safely-managed, city-wide services, and private enterprises interested and capable of delivering these services on a commercially viable and inclusive basis. As part of their agreement with city authorities, SWEEP enterprises are required to ensure that at least 30% of their customers are from LICs. For further information on the SWEEP model, please see https://www.wsup.com/content/uploads/2017/10/Two-pager\_SWEEP.pdf.

In Chattogram, WSUP has supported two enterprises to enter into agreement with the Chattogram City Corporation (CCC) to deliver pit emptying services under the SWEEP model. The first, Chittagong Sheba Sangstha (CSS), began operating in April 2017. The second, M/S. Forak Ahmed & Sons, started in January 2019. A third enterprise is expected to start SWEEP operations in early 2019.

Both enterprises currently engaged with SWEEP in Chattogram were well established before engaging with SWEEEP. CSS, for example, is a private medical waste management company that delivers medical waste collection services within a PPP framework to a number of clients, including health clinics, hospitals and pharmacies. These businesses have taken on SWEEP as part of their service portfolio by employing additional staff within their business to form a small team to run the SWEEP operations. The SWEEP teams are small, consisting of a truck driver, two operators and a manager.

Each SWEEP enterprise has signed a lease agreement with the CCC to provide SWEEP services using vacuum trucks provided by the CCC. In turn, WSUP has entered into an agreement with the CCC to provide marketing and technical support to the enterprises. WSUP receives monthly performance reports from the enterprises in order to monitor their operations and inform the nature of the support to be provided.

The SWEEP enterprises have been successful in delivering services to high and low-income residents along with businesses and other institutions; however, WSUP believes that the need for SWEEP services in low-income communities in Chattogram is high and that demand for service provision in these communities could be increased. SWEEP enterprises currently promote their services through sales agents conducting door-to-door visits, and by putting up posters and giving out promotional materials such as key rings; however, this strategy needs to be improved. WSUP has recognised that while these approaches have generated demand for SWEEP services among high-income populations, they have had limited impact on service uptake in low-income areas. WSUP therefore seeks to improve the SWEEP business model in Chattogram by developing a new and innovative marketing strategy that is targeted at low-income communities.

In late 2018, WSUP partnered with UNILEVER to begin supporting SWEEP enterprises in Chattogram to review their marketing strategy and adopt a more innovative strategy that is cost effective and increases awareness of SWEEP in low-income communities.

Under this Terms of Reference (ToR), WSUP is seeking consultancy services to develop a marketing strategy for SWEEP services in Chattogram that will raise demand for SWEEP services in low-income areas. The consultant will be expected to conduct initial market research, develop and test a number of marketing strategies, and provide the necessary capacity-building support to SWEEP entrepreneurs and WSUP staff to ensure marketing activities can continue on a long-term, sustainable basis at a large scale.

Under a separate terms of reference, WSUP is also seeking consultancy services to develop a new and innovative sales strategy for SWEEP enterprises in Chattogram. Consultants will be able to bid for both contracts; however, if separate consultancies are selected, the consultants will be expected to cooperate in order to find synergies between the marketing and sales strategies where appropriate. The sales consultancy procurement began shortly before this procurement.

## 2. Objectives

## 2.1. Aim

To develop, test and embed an innovative marketing strategy for SWEEP operators in Chattogram in order to increase awareness of, and demand for, SWEEP services among low-income communities.

## 2.2. Specific Objectives:

# Undertake market research to understand the FSM market among LICs in Chattogram;

# Develop, support testing and refine an innovative marketing strategy with appropriate marketing collateral for SWEEP services in selected low-income areas;

# Develop a training package and train SWEEP enterprise staff and other relevant parties to implement the marketing strategy on a long-term basis at a wider scale;

1. Facilitate and oversee the roll-out of the finalised marketing strategy across all three SWEEP enterprises in Chattogram.

## 3. Scope

The consultant is expected to work with WSUP and SWEEP enterprises to understand the SWEEP business model and existing SWEEP operations in Chattogram. The consultant will work with WSUP and the SWEEP enterprises to understand the existing marketing strategies employed by SWEEP staff in terms of messaging, cost-effectiveness, reach and audience, among others. An excellent understanding of the financial and human resources of the SWEEP enterprises will be necessary for informing the design of the marketing strategy.

WSUP will identify one city ward in which to conduct the initial marketing strategy development. The marketing strategy will need to be informed by the needs, demands and resources of low-income communities in Chattogram. Therefore, building on existing resources, the consultant will be expected to conduct primary and secondary research to understand the characteristics of the target population and their actions, attitudes and abilities with relation to FSM and SWEEP services.

The market research should be conducted in consultation with a number of stakeholders, including; SWEEP Entrepreneurs, WSUP, UNILEVER, the Department of Public Health Engineering (DPHE) and the Chattogram City Corporation.

Based on the results of the market research, the consultant will be expected to finalise an initial draft marketing strategy including one or more marketing activities. Working with WSUP, the consultant will then support one of the three SWEEP enterprises to conduct these marketing activities in the selected city ward. The SWEEP enterprise will lead on strategy implementation with guidance and support from WSUP and the consultant. The consultant will be expected to provide marketing training to the relevant staff of the SWEEP enterprise to undertake the marketing activities. WSUP will cover the cost of implementation including the costs of marketing collateral on the condition these costs are discussed and agreed to beforehand by WSUP and the consultant during the finalisation of the initial draft strategy.

As the marketing activities are conducted, the consultant will be expected to evaluate the impact of the marketing on the actions and attitudes of the target population, as well as the sales and profits of the SWEEP enterprise. This should be made possible by the implementation of a robust monitoring and evaluation methodology and framework. Within this framework, the consultant will be expected to define key performance indicators prior to testing to assess the performance of the marketing strategy.

Using the impact results of the initial marketing strategy, the consultant will support WSUP and the SWEEP enterprise to iteratively test and refine the marketing strategy in the selected city ward. The consultant will be expected to continue monitoring to assess the impact of the strategy refinements, and to produce regular reports detailing the performance of the marketing activities, the refinements made to the marketing strategies, and the logic behind these refinements.

It should be noted that SWEEP is a social enterprise model that aims to have a high social impact while also generating a profit for the enterprise. The consultant’s recommendations should focus on raising awareness of SWEEP services in the targeted LICs but should also be aware of the SWEEP enterprise’s bottom-line and its potential for long-term sustainability. The finalised marketing activities will be conducted by the SWEEP enterprises and any partners they can leverage, and as such, the strategy should be proportionate to the resources available to the SWEEP enterprises.

Following strategy testing and refinement, the consultant is expected to produce a finalised marketing strategy that can be scaled-up across all three SWEEP entrepreneurs and the other 40 city wards in Chattogram. The consultant will provide support to WSUP and the SWEEP enterprises to facilitate this scale-up. In doing so, the consultant is expected to train the relevant staff of the three SWEEP enterprises to implement the marketing approaches on a long-term basis. This will include defining staff responsibilities for marketing activities and embedding marketing processes within the SWEEP enterprise teams.

The consultant will also conduct ‘training of trainers’ to enable WSUP staff to share the marketing training more widely with other SWEEP enterprises in the future and in other cities in Bangladesh. This will entail training relevant WSUP staff alongside or separately to the SWEEP enterprises. The venue and other costs associated with the trainings will be paid for by WSUP. The consultants are expected to budget for the trainers’ time and training material printing.

3.1 Activities and Deliverables

The consultant is expected to undertake the activities and produce the outputs/deliverables presented in Table 1. These need to be completed within the WSUP/Unilever project timeframe which has an overall implementation completion date of the end of March 2020. These suggested activities and deliverables should act as a guide. WSUP encourages the consultant to add, adjust and delete steps.

## Table 1 – Expected Activities and Deliverables

|  |  |  |
| --- | --- | --- |
| **No** | **Activities** | **Deliverables** |
| 1 | Review of existing materials and stakeholder consultation to build understanding of the SWEEP model and its operations in Chattogram | * Detailed workplan and approach to delivering the scope of the consultancy.
 |
| 2 | Conduct research on target low-income population, consult stakeholders including WSUP, SWEEP enterprises, Unilever and Unilever small shop network. | * Presentation on summary of findings and key recommendations for market strategy development
 |
| 3 | Prepare initial marketing strategy and initial training package for marketing activities | * Report detailing initial marketing strategy with summary of stakeholder comments
* Initial training package for SWEEP enterprise staff to conduct initial marketing activities
* Plan detailing the strategy test and refinement phase
 |
| 4 | Prepare a monitoring and evaluation framework for assessing the strategy during testing | * M&E framework with KPIs.
* Methodology for collecting and analysing necessary data
 |
| 5 | Support one SWEEP enterprise to implement the initial marketing activitiesIteratively test and refine the marketing strategyReport on successes, failures and changes made to the strategy | * Increased capacity of SWEEP operator staff to deliver marketing strategies
* Regular reports on performance of marketing activities and the refinements made
 |
| 6 | Finalise the marketing strategy and develop an action plan to scale up the strategy | * Finalised marketing strategy
* Summary of findings from the pilot phase including financial impact on entrepreneur’s operation
* Scale-up action plan, budget, monitoring and evaluation plan
 |
| 7 | Develop full training package for SWEEP enterprises and WSUP staff | * Training curriculum
* Training plan
 |
| 8 | Support WSUP to scale up the marketing strategy across all three entrepreneurs and their areas of operation. | * Training of entrepreneurs to conduct marketing activities.
* Roll-out of marketing strategy.
* Training of Trainers for WSUP staff.
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## 4. Required Skills and Experience

The team of consultants should have the relevant qualifications/ experience required to accomplish the tasks as mentioned in this ToR. The assignment will require a team with the following characteristics:

1. At least 5 years of experience in marketing strategy development and implementation;
2. Degrees in marketing and education from any reputed organization;
3. Previous work experience in Bangladesh and established presence in Bangladesh;
4. Previous marketing work experience with low-income populations;
5. At least 2 years of experience in the preparation of training modules (desirable).

## 5. Working Conditions

Table 1 outlines the expected activities and deliverables to be completed by the consultant. It is expected that the consultant’s work will be a combination groundwork in Chattogram and remote support and reporting to SWEEP enterprises and WSUP. The consultant will be required to use their own resources to carry out this assignment, including implementing costs for market strategy testing, which would be charged to the Client. The proposal should include a financial proposal budgeting for the activities in Table 1, including the following:

1. Vehicles/Transportation
2. Personnel
3. Stationery
4. Subsistence of staff
5. Material costs of implementing the activities
6. Any other identified costs.

## 6. Submission of Proposal

Proposals shall be submitted to the contacts below before 17h00 on Saturday, March 30th, 2019.

WSUP Country Programme Manager, wsupbangladesh@wsup.com.

The indicative budget for the assignment is BDT2,000,000.00 excluding implementation cost. WSUP will bear the implementation cost includes printing materials, marketing campaign, logistics cost for training etc.

The consultant will submit separate technical and financial proposals. The **technical proposal** should provide the following amongst others:

1. brief description of the consultant's experience and an outline of similar assignments conducted in the last five years;
2. previous clients list; and identify 3 that WSUP can contact for reference
3. detailed description of consultants’ approach and methodology to the assignment;
4. the consultants’ detailed work plan and schedule for executing the assignment; and
5. the consultants’ CV.; the proposed team with responsibilities

The **financial proposal must be priced in Bangladeshi Taka** andshould include the following:

1. all costs relevant for the implementation of the assignment; and
2. Value Added Tax (VAT).

The budget for assignment implementation should be broken down according to the activities and deliverables outlined in Table 1 and the payment schedule outlined in Table 2. These tables should act as a guide and not a rigid structure.

## 7. Evaluation of Proposals

Proposals will be evaluated based on the broad areas listed below:

1. relevant experience
2. approach and methodology to executing the assignment
3. work plan and staff inputs; and
4. financial proposal

## 8. Terms of Payment

Payments will be made in accordance with the various phases and the schedule of payments stated in these terms of reference. The consultant’s financial proposal should break down the costs of the assignment into the phases below.

## Table 2 - Payment Schedule

|  |  |
| --- | --- |
| MILESTONE | PAYMENT |
| Completion of activities 1-4:* Market research and stakeholder consultation
* Initial marketing strategy
* Strategy testing plan, budget, monitoring and evaluation plan
 | Based on proposed costs in the proposal |
| Completion of activities 5 and 6:* Testing and refinement of marketing strategy
* Finalised marketing strategy
* Action plan for scale-up of marketing strategy
 | Based on proposed costs in the proposal |
| Completion of activities 7 and 8:* Training of marketing staff of three SWEEP enterprises
* Training of trainers/WSUP staff
* Implementation of marketing strategy by all three SWEEP enterprises
 | Based on proposed costs in the proposal |

## 9. Reporting

The consultant would report to WSUP Bangladesh's Sanitation Lead. A reporting schedule will be developed with further consultation with WSUP.

## 10. General Terms and Conditions

● WSUP reserves the right to accept or reject any proposal without giving any verbal and/or

 written rationale;

● All reports and documents prepared during the assignment will be treated as WSUP’s

 property;

● The reports/documents or any part, therefore, cannot be sold, used and reproduced in any

 manner without prior written approval of WSUP;

● WSUP in Bangladesh reserves the right to monitor the quality and progress of the work

 during assignment;

● WSUP will deduct Tax and VAT at source according to the Bangladesh government policy.

## 11. Contract Requirements

It is a requirement of this Contract that the Consultant and all their staff and representatives will comply with the following policies of WSUP:

* Child Protection
* Health and Safety
* Business and Ethics <http://www.wsup.com/intro/documents/WBP800-BusinessEthicsPolicy.pdf>

These policies are available upon request at any time.