Date: September 20, 2022

**Terms of Reference**

**Consultancy on Longitudinal Case Studies Collection**

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1. **Organization Background**

iDE is an international NGO with over 35 years of experience in designing and delivering market-based anti-poverty programs in 11 countries. We are a world leader in making markets work for the poor as well as the longest established market development specialist NGO in Bangladesh. iDE believes that markets can be a powerful force for improving smallholder prosperity by creating income and livelihood opportunities for poor rural households. iDE Bangladesh currently has eight projects in agricultural markets, water, sanitation and hygiene (WASH), and access to finance with a focus on women’s economic empowerment and climate-smart technologies.

1. **Background**

Uddokta - empowering entrepreneurs - is a three-year (2020-2022) project co-funded by Chevron and the Swiss Agency for Development and Cooperation (SDC) and implemented by iDE. From the Chevron stream, Uddokta project is a collaboration under the Bangladesh Partnership Initiative (BPI). The project, through a market-based approach, seeks to identify and support 1,100 enterprises to start or grow their businesses and achieve profitability. Through the systemic market change that they trigger, an anticipated 37,125 household members will benefit from increased incomes as a result of improved access to the goods and services that these enterprises will bring. iDE will apply a market-facilitation approach that aims for private sector-led promotion and sustained adoption of beneficial products, services and behaviors by communities and households in the target markets - which will ultimately lead to increased incomes. The project has two overarching goals: the​ first goal is to increase household incomes​ in a nine Union catchment area in the Sylhet region through improved access by targeted communities to a variety of market-based inputs and services. This goal is complemented by the second goal of the project which seeks to further strengthen Chevron’s relationship with the beneficiaries and create sustainable impact in the community directly attributable to Chevron’s investment through the project.

Uddokta goals target four key results: (1) 20% increase in incomes of 2,750 direct households by project end; (2) 15% increase in incomes of 1,100 MSMEs (Micro and Small Enterprises) by project end; (3) income increase of 15% in 7,500 indirect households by project end; and, (4) a combined leverage from key market actors as investment and trade of USD 1.5 million through partnerships and market facilitation benefitting direct and indirect beneficiaries of the project.

1. **About the Assignment**

iDE is looking to hire a consultant/firm to produce 45 publishable case studies for the Uddokta project. The project is being implemented across three districts in Sylhet division namely Sylhet (Sylhet Sadar upazila), Habiganj (Nabiganj Upazila), and Moulvibazar (Sreemangal, Kamalganj Upazila). **Primarily**, the purpose of the assignment is to prepare case studies that capture the current economic and business situation of beneficiaries covering project’s different sectors at individual level (mainly the consultant/firm is expected to capture post- project intervention condition, which includes- market system, linkages with sector specific different market actors, assets condition, income, expenditure, sales and production, investment, future prospect, either the expectation from the project met or not, along with basic information of the beneficiary) and document them with high-quality images (action-oriented photos and also, the photo should reflect the beneficiary’s current condition); and **secondarily**, create and raise the profile of the project’s portfolio through comparing 2020 collected longitudinal case studies.

Unlike cross-sectional studies, in which different individuals with the same characteristics are compared, longitudinal studies track the same people, and so the differences observed in those people are less likely to be the result of cultural differences across generations. A case study is a factual representation of what happened along with some analysis that provides insights and learning for the future. Case Stories depicts what happened through people, place, and plot and brings emotional context into the portrayal of what happened. Keeping that in mind, we are preferring to blend both the methods and collect the cases. The consultant/firm will produce the same set of 45 longitudinal case studies (comprising different sectors, and market actors which was collected in the year 2020) that will include high-quality photographs with captions. The assignment is expected to take place in the first week of October in Sylhet division. The exact duration of the assignment will be finalized after consultation with the consultant/firm as well. The consultant/firm will develop a work plan based on discussion and consultation with the project team, incorporating any feedback provided by them. To complete the assignment, the consultant will need to **visit the project location** **for at least 10-12 days during the contract;** followed by high-quality editing, and preparing the stories and final delivery within next month. The assignment duration is one and half months after signing the contract.

1. **Major responsibilities of the Consultant/Vendor**

The consultant/firm will work with the Uddokta team in a collaborative manner to appropriately develop the final impact report along with the photos and images for accurate branding and visibility of the project and its donors and partners. The consultant/firm will be primarily responsible for the following:

* Kickoff discussion with the iDE team to learn about the project and specific requirements of the assignments;
* Develop a work plan (includes the questionnaire and training modules if required) in consultation with iDE;
* The consultant has to visit the project locations in the fixed month (e.g. October) to collect and study the real scenario;

**High-quality Case Studies:**

* The consultant will conduct a longitudinal study on selected beneficiaries, collect data and prepare **human centric** case stories. The same set of beneficiaries will be observed unlike the first year of the project and show the project impact;
* All case studies must be written in complete sentences in proficient English;
* All case studies must be edited into a quality report that is publishable so that it can be distributed to key stakeholders. iDE will provide acceptable report sample for guidance;
* Assure the quality of the data, filter and share all the raw data collected;

**High-quality/High-Resolution Photographs:**

* **Capture high-quality/high-resolution images**  (properly exposed, framed, focused, and edits well optimized) of same and pre-selected beneficiaries during the contract period. Each image from the optimized edit as well as the full take must include in the metadata: the full name of the consultant for photo credit, the name of the place, the date, the venue, and the Upazila, District. In addition to required information, a descriptive caption written in complete sentences in English is mandatory. The caption should describe the who, what, when and where of the photo;
* The photographs produced under the assignment must capture successfully and express emotionally the core elements of the situation assigned for coverage. The coverage will include different visual perspectives (close-up, medium range, long distance), with a preference for horizontal framing, as noted. Complete caption information and other metadata will be embedded in the files, as described;
* When key images are shot in horizontal format, ensure enough space is available around the key subject. The Consultant will need to keep this space in mind and leave some room while capturing to make the photo publication friendly and to crop the image later on;

**Important for both case study and photography:**

* Consultant MUST get the consent form, provided by iDE, signed/completed for each of the individuals discussed in every single case study, and each of the photographs;
* Consultant MUST submit both the edited and raw data, case stories and photos separately; using Google Drive and on an external hard disk for further possible use;
* Consultants MUST abide by the agreement and iDE’s Policy and Guidelines;
* Consultants MUST ensure the deliverables, timelines and deadlines agreed mutually;
* Consultants MUST bear the necessary transportation and accommodation by her/himself to complete the assignment.

1. **Major responsibilities of iDE**

iDE will provide the consultant/firm with necessary support to undertake and implement the assignment and execute the objectives of this assignment. Such responsibilities include the following:

* iDE will take responsibility for the procurement of the consultant/firm
* Provide initial briefing and existing work overview;
* Provide relevant orientations and technical support;
* Provide editorial guidance to the consultant to enable him/her to understand the Deliverables required and generate captions to embed in the photographs;
* Provide support in the field;
* Monitor regularly, and provide feedback and ensure effectiveness of the assignment;
* Disburse payment as per the agreed schedule in the contract

1. **Key Deliverable**

The following deliverables are expected from the consultant/firm:

* Inception report comprises methodology, checklist, questionnaire, work plan, etc.
* Consultant will submit the first draft of the case studies, images presentation to the Uddokta team for feedback, opinions and suggestions
* Draft 45 case studies and consent form and at least 200 quality photographs. Both raw and edited images submission using Google Drive/a Portable HDD.
* Final submission of 45 case studies (after incorporating feedback from the team)
* Submission of 200 Printing copies of the documents

1. **Duration of the Assignment**

The consultant/firm is expected to start work on or around the second week of October 2022. This assignment should be completed within 45 days from the start date, which includes completion of all tasks in the assignment along with the submission of the deliverables as detailed in Section 4 & 6. Based on unavoidable circumstances, the period for conducting the assignment might change. The consultant/firm is expected to be able to accommodate these changes without additional cost. A final detailed work schedule will be determined during the kick-off meeting.

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| Sl No. | Deliverable | Oct- Nov, 2020 |
| 1. | Participate in the orientation meeting, understand the assignment, share detailed work plan aligned with the ToR plan | 2nd week of Oct’20 |
| 2. | Visit field, identify the given beneficiaries, prepare template keeping in mind project expectations, and collect stories | 3rd-4th week of Oct |
| 3. | Submission of 1st draft of case stories | 2nd week of Nov ‘22 |
| 4. | Final submission of case stories after incorporating all the comments, Submission of all the relevant photographs (as per guidance), consent forms (Hard copy) and published copies. | 3rd week of Nov’22 |

1. **Proprietary Rights**

Any document, information or data entrusted to or produced by iDE in connection with this assignment shall be strictly confidential and cannot be used by the contract employee for any other purpose without the written consent of iDE. iDE can re-use, re-edit all the photographs or any part thereof as convenient for its own need/way/process of utilising the data, case stories and photographs in any medium. iDE may provide the data, case stories and photographs to other agencies/sector actors and the media at no cost. This provision shall remain valid even after the completion of this assignment. iDE’s general protocols and policies for working with hired consultants will be applicable. iDE will not indemnify and defend the consultant for any loss during this assignment and will not insure him/her while accomplishing the task. iDE-B reserves the right to terminate this agreement at any time with the consultation of the contracted individual/firm.

Any document, information or data entrusted to or produced by iDE in connection with this assignment shall be strictly confidential and cannot be used by the contract employee for any other purpose without the written consent of iDE. This provision shall remain valid even after completion of this assignment. iDE Bangladesh reserves the right to terminate this agreement any time with the consultation of the contracted individual/firm.

1. **Applicant Eligibility Criteria**

General experience and expertise requirement for consultant/vendor applying:

* Strong theoretical and practical background using different eye-catching images, including photo gallery and the use of design software.
* Showcase of more interesting ways to represent Uddokta project goal twisting with global sectoral ideas. Clear and mature style of design, demonstrating an understanding of the communication requirements of an international development organization.
* Good understanding of new and evolving technologies and digital platforms;
* Work experience in the development or humanitarian environment/sector is desirable.

1. **Budget and Payment Schedule**

The financial proposal should include all costs including consultants' fee for conducting the entire assignment until final deliverables submission. This should include remuneration, field-based travel (accommodation, transport, per diems) and any miscellaneous costs.

**Note:** Government VAT and tax regulation will be applied, and these costs must be included in the financial proposal. The consulting fees payment will be made in two installments as follows:

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| **Deliverables** | **Installment Value** |
| **Deliverable 1:** Submission of inception report including approved work plan, methodology, questionnaire | 25% |
| **Deliverable 2:** Draft 45 case stories | 25% |
| **Deliverable 3:** Submission of acceptable deliverables of Final 45 case stories, minimum 200 photographs, 45 consent forms, printed copies of the case stories and or any other relevant documents. | 50% |

The following terms and conditions will apply:

* The payment will be made through account payee cheque/ wire transfer (account name, number, type, bank name, and branch name is required for wire transfer);
* As per Government of Bangladesh VAT and tax regulation; International consultants are charged at 15% VAT (on contract amount) and 20% tax (on contract amount +VAT); National consultants are charged at 15% VAT and 10% tax;
* Government VAT and tax regulation will be applied and iDE Bangladesh will deduct all relevant VAT and Tax at source as per GoB rule;
* VAT Registration Certificate, TIN and Trade License (if applicable) must be submitted before the agreement is signed;
* In case of failure to deliver the final product in due time, iDE Bangladesh will deduct .05% of the total agreement amount for each day of delay in submitting the report beyond the closing date of the agreement;
* The selected consultant/firm will abide by other terms and conditions of iDE Bangladesh.

1. **Bid Submission**

# The proposal must include:

* Cover letter (maximum one page)
* Technical Proposal (maximum five pages) which should include:
  + Understanding of the assignment and a detailed work-plan
  + Relevant experience of the consultant/vendor
  + Links to samples of previous work in a Google Drive folder
  + CV of the assigned key personnel, if a consultant/vendor is submitting a proposal
* Financial Proposal: breakdown of cost estimates. This should include, but not be limited to accommodation, travel costs, food expenses, and other items needed for the assignment.
* Copy of necessary legal documents
* Company profile
* VAT Registration Certificate
* TIN Certificate
* Joint Stock Company Registration Certificate
* Trade License Certificate

1. **Eligibility Criteria**

General experience and expertise required for this consultancy assignment are mentioned below:

* Master degree in social science, development studies, economics, or other relevant subject of the consultant;
* Experience in working with NGOs is highly desirable;
* Brief profile of the consultant/firm;
* Demonstrable prior experience in process documentation, photographing and recording similar projects/activities, with portfolio provided upon request;
* Ability to communicate cross-culturally; collaborative nature;
* Personal commitment, efficiency and flexibility, together with the ability to work independently under minimum supervision;
* Good command over English and analytical abilities for storytelling to write the content.

Interested and qualified consultants/ firms are asked to submit their Technical and Financial Proposals to [bangladesh.procurement@ideglobal.org](mailto:bangladesh.procurement@ideglobal.org). Please write ‘**Uddokta- Consultant for longitudinal case studies’** in the subject line. The proposals should be submitted by **4:30 pm BST on 2 October 2022**. We are only able to consider electronic submissions. Only shortlisted consultants/firms will be contacted and invited for a technical discussion.