

FINSCOPE DISSEMINATION - MEDIA COORDINATOR

TERMS OF REFERENCE

1. INTRODUCTION

The Financial Sector Deepening Trust (FSDT) was established in Tanzania in July 2004 with the aim to develop market systems that benefit low-income individuals, households and enterprises, offering them capacities and opportunities to improve their lives. This involves working with partners in the financial sector to address and support challenges and innovations such as:

- The development of new financial products that address the needs of poor households and micro and small enterprises
- The development and improvement of financial sector policies and regulations as well as the legislative and regulatory frameworks affecting delivery of financial services
- Initiatives aimed at improving financial market integration and access to wholesale forms of finance by financial service providers addressing poor households and micro and small enterprises
- Initiatives aimed at enhancing the supply of appropriate services to financial service providers in Tanzania.

In pursuit of its objectives, the FSDT works with a number of donor partners including the Swedish International Development Agency (SIDA), the Danish International Development Agency (DANIDA), the UK Department for International Development (UKaid), the Bill & Melinda Gates Foundation, the Government of Canada (DIFTAD), the Bank of Tanzania and the Government of Tanzania.

BACKGROUND OF THE ASSIGNMENT

The objective of commissioning a media expert for the FinScope dissemination process is twofold: (a) to deploy the optimal media mix to achieve the dissemination objectives and ensure relevant FinScope findings reach the targeted audiences; (b) guarantee that messages are professionally designed for and appealing to their respective audiences.

The media expert will also be required to; provide input to the dissemination strategy; advise on institutional arrangements with media houses and media agents; proactively support the creation of high-quality TV and radio publicity and possibly other programming, advising on the messages to be conveyed and suggesting improvements; and as required support the other agents engaged on FinScope dissemination.

1.1 THE PROJECT

The overall objective of FinScope Tanzania 2017 survey is to identify, measure and profile levels of access to financial services by all adults aged 16 and above in Tanzania. Further to that FinScope Tanzania 2017 also seeks to provide an

understanding of the financial services needs of consumers (individuals, farmers, business owners) from different demographic backgrounds (gender, location, age and wealth). The information gathered from FinScope Tanzania 2017 is the thereafter made available for use by different stakeholders.

The survey has five main aims:

- To define the financial services needs of consumers (individuals, farmers, business owners)
- To establish credible benchmarks and measures of effective financial inclusion
- To provide insights into any regulatory and market obstacles to access and usage of financial services
- To provide insights which will feed into innovation in the financial sector
- To highlight opportunities for policy reform and innovation in product development and delivery and
- To provide insights into FSDT thematic areas (Agriculture & Rural Finance, Digital Finance, SME Finance and Insurance)

FinScope Tanzania 2017 is instrumental in addressing a number of constraints outlined in the research strategy. These include;

1. Lack of frequent and timely demand side data
2. Lack of evidence based policy formulation and product development in the financial sector

FinScope Tanzania 2017, is aligned to FSDT's research agenda whose vision is to see a financial sector whose players use evidence when making decisions that results in solutions that meet the needs of market and contribute to economic growth.

The research team at FSDT aims to facilitate the utilization of rigorous research findings and insights which will help the financial sector to better understand the market and inspire innovation. In implementing the FinScope 2017 survey, FSDT is looking to contract the services of a media and event coordinator.

2. OBJECTIVES OF THE ASSIGNMENT

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improvements; and as required support the other agents engaged on FinScope dissemination.

3. SCOPE OF WORK AND LENGTH OF ASSIGNMENT

The scope of work for the media expert can only be finalised in consultation with several of the agents working on the dissemination and subject to FSDT's final approval. Consequently, the scope of work set out below is currently expected a maximum in terms of input required of the media expert. Technical and financial proposals should be based on this assumption. However, if additional work is required, this may be agreed between FSDT and the selected media expert and a contract amended to cover this.

3.1 SCOPE OF WORK

The media expert will be responsible for advising on the media mix used to reach the diverse audiences including financial service providers, policy makers, product development teams via different dissemination channels. The first step is to create awareness among the public and institutional consumers about the FinScope survey and its objectives. The dissemination process should also aim to ensure they appreciate the value of FinScope research by: (a) creating trust in the survey processes and findings (in part by referring to the funders, champions and public entities involved); (b) conveying the message that the research information represents the true situation of Tanzanians across the whole socio-economic spectrum; (c) informing people about the actual findings of the research; and (d) driving uptake and utilization of the findings.

One of the main tasks of the media expert will be to advise on:

- the media to be used to reach different target audiences
- the program design and content
- the quantity and detail of technical information that different audiences with diverse levels of experience and education can be expected to absorb
- the most appropriate formats in which information should be presented and displayed.

For this, the media expert may have to attend working meetings and participate in exchanges between different dissemination agents as well as with FSDT, FinScope Technical Committee (TC) and the Steering Committee (SC) whenever dissemination issues are addressed. The SC will be expected approve the final version of the dissemination strategy.

The scope of work for this assignment comprises the following tasks:

3.1.1 TASKS TO BE PERFORMED

Along with specific tasks, the media expert will be required to suggest the optimal media mix to accomplish the dissemination objectives. The FinScope 2017 dissemination will deal not only with the latest FinScope findings, but also with:

- the FinScope survey itself, i.e. summarizing the salient facts about the survey and how it is conducted
- summaries of the key findings from the FinScope survey 2006, 2009 and 2013
- the reliability and trustworthiness of FinScope surveys and reference to additional information, and
- details of the upcoming launch of FinScope findings and how they can be used for socio-economic development in Tanzania.

The media expert is expected to review and, if necessary, improve all suggested media dissemination measures. He/she may also suggest new or other means of dissemination, tools, instruments and approaches to accomplish the dissemination objectives.

The media expert will take the lead putting in place institutional arrangements between media houses and FSDT. The aim of these arrangements will be to streamline FinScope dissemination efforts within the major media houses that own TV and radio stations, as well as newspapers. In addition, FSDT wants to help create knowledge and understanding about FinScope within the major media houses. The media expert will be supported in this by the Head of Research and FSDT's Communications Advisor. Work in this area will include setting up meetings and drafting the content of the document describing the arrangement between the FSDT and the media house.

The media expert will also be expected to take the lead in the design and smooth implementation of the launch and other dissemination events such as workshops.

3.1.1.1 ADVISE ON THE MEDIA AND CONTENT TO BE USED IN THE PREPARATION PHASE

The actual launch of the FinScope findings is expected to take place between late August to mid-September 2017. The preparation phase has already started and will run up to the day before the launch.

During the preparation phase numerous tasks, materials and media programs will require the professional input of the media expert. These are likely to be:

- Design of FinScope television and radio outputs that will include series and one-off media events using FinScope resource people.
- Review of scripts and interviews

- Planning and smooth implementation of public relations at the launch including the press conference
- Press releases dealing with the upcoming launch and the mini launches of the niche reports (working with the technical writer)
- The design of a system to monitor the public relation activities, outcomes and provisional impact that will speak to subsequent direction of the PR plan implementation.

Although not solely responsible for these tasks, the media expert will, as a specific deliverable, be required to provide input on:

- FinScope information for one-off TV and radio events
- production of a newspaper and radio series
- news releases, newspaper articles and editorials

3.1.1.2 ADVISE ON THE MEDIA AND CONTENT USED IN THE ACTIVE DISSEMINATION PHASE

The immediate dissemination phase starts with the actual launch of the FinScope findings and runs up until one month thereafter. During the immediate dissemination phase she/he will be required to provide professional input and, as necessary, suggestions for improving:

- News articles, editorials and other contributions to printed materials.
- Scripts and interviews for television and radio production series or one-off media events with FinScope resource people.
- Ensure availability of all media outputs for the FSDT website.

The media coordinator will also be expected to provide media management services that includes (a) media attendance (b) payment of transport allowance to the media, and (c) tracking and report on media coverage at the event.

3.1.1.3 ADVISE ON THE MEDIA AND CONTENT IN THE ENGAGEMENT PHASE

The engagement phase starts in the second month after the launch of the FinScope findings, lasting until six months thereafter while the long term phase starts from the sixth month onwards.

In this phase more specialized FinScope information will be disseminated to targeted audiences. It is in this phase that institutional stakeholders are likely to be using FinScope data and analyses most heavily, and where the stakeholders of each sub-sector can deepen their FinScope knowledge.

To accomplish this, the media expert will take the lead in the creation and smooth implementation of programming that will engage different stakeholders and also push for use of the data. This phase will also involve the launch of 6 niche reports.

The media expert will ensure that launch of the reports is heightened by concurrent and relevant radio and television programming as well as newspaper articles that will support the momentum of the launches and subsequent engagement.

The ultimate objective is to push for the utilization of data and information by stakeholders for formulation of solutions and policies.

This phase we plan to target our key stakeholders with initiatives aimed at developing greater awareness and understanding of financial inclusion and how FinScope can help organisations develop more effective strategies to respond to opportunities on the ground. Work in this phase is also aimed at developing the perception that FinScope is complementary to other research being undertaken.

The media expert is expected to review, improve and streamline materials that will be uploaded onto the FSDT FinScope library site. The media expert will advise on how best to document FSDT FinScope events and how to make this information readily accessible online.

The media expert is again expected to provide professional input and suggestions for the design and content of different fora and/or blogs where FinScope audiences can interact or enquire about additional information.

The specific deliverable required from this phases is to provide input and endorse all media related materials, dissemination measures, programs and events.

4. METHODOLOGY

The preparation phase will be the most intensive period in terms of the number of materials which will need to be developed and drafted and the events to be designed. The media expert is expected to provide input at least 10 days per month.

During the engagement phase (one month after the launch) the media expert will be required to provide professional services for up to 4 days per month shifting to 3 days per month in the long term dissemination phase of the FinScope survey which will run for approximately 9 months. We expect to launch the survey results between late August and Mid-September 2017.

The assignment will kick off with an inception meeting which will include the FSDT Head of Research, research advisor, communications advisor, writer and the research house.

5. CONDUCT OF THE WORK

The consultant will report to FSDT. The FSDT will provide Staff time and relevant project documents including the original project implementation Plan, Grant

Agreement, Project Appraisal Report (PAR), and Project Performance Reports that were submitted on quarterly basis from the beginning of the Project.

The FSDT Head of Research is responsible for oversight of the FinScope dissemination. Throughout the assignment, the media expert will report to the Head of Research to advise on progress and any difficulties encountered. The Head of Research will also facilitate collaboration between the media expert and all other agents involved in the dissemination.

Although FSDT's Communications Advisor will take the lead in the negotiations between the FSDT and media houses, the media expert will advise her on these discussions and will draft the institutional framework for FinScope dissemination. The media expert will further oversee the design of a one-off series of newspaper and radio programs (if agreed with FSDT) and closely collaborate with the video and audio production company selected.

The media expert will collaborate as part of a virtual team and in face-to-face meetings. The FSDT will provide a work space at their office if and when needed.

FSDT will provide input and edit if necessary:

- Branding elements
- FinScope graphs, infographics, data, etc. as needed

The media expert will collaborate closely with the Head of Research, communication advisor, the technical writer(s), and the research house (Ipsos Tanzania). The Head of Research will provide the analysis and information which will become the content for media material.

6. DELIVERABLES FROM THE ASSIGNMENT

The media expert is expected to submit the following working material and reports:

- Recommend amendments to the overall dissemination / engagement plan
- Recommended amendments to the public relations plan
- Develop a media mix for all the survey phases
- Draft agreements or MoUs between FSDT and media houses
- Program designs for television and radio programs (one-off and also series)
- A report on all materials, media and events produced during each particular phase, together with an assessment as to how best the impact of these could be measured by whom and at what times.

7. TIMETABLE

The media expert is expected to start the assignment in June 2017 and will have to complete the assignment by July 2018.

8. PAYMENT SCHEDULES

The media expert will be paid monthly in arrears based on the actual time spent and according to timesheets submitted to and approved by FSDT, up to a maximum of days per month as outlined above.

The FSDT will be reimburse all agreed travel and other expenses upon submission of relevant receipts within ten days of approval of invoices submitted by the consultant.

9. PROFILE OF THE CONSULTANTS

The media expert will be a native English speaker and have experience with research and mass communication.

The selected media expert will have proven experience being part of a bigger team organizing a dissemination process in Tanzania. She/he should be accustomed to working virtually using a number of online applications to guarantee smooth collaboration with a number of agents.

10. PROPOSALS – FORMAT AND SCOPE

Consultant should submit a technical and financial proposals for undertaking this assignment. These may be submitted electronically. The deadline for submissions is Friday 16 June 2017

10.1 TECHNICAL

Technical proposals should be no longer than 5 pages, excluding any appendices. The technical proposal should focus on the approach to the work, as well as relevant experience. Consultant is invited to comment on the ToRs and suggest amendments. Any corporate capabilities, reference projects and detailed CV should be appended. Reference projects should (where appropriate) detail the length of time since the consultant performed the duty, key tasks performed in an assignment, geographical location and contact person(s). The CV must be no more than five pages containing the relevant and required information only.

11. EVALUATION AND SELECTION

12.1 METHOD USED

Overall, the preferred bidder will be selected on the basis of presenting the most economically advantageous tender. This means that bidders will be evaluated on a combination of technical and financial criteria. In this case the ratio between technical and financial scores will be 80/20.

The technical component of each proposal will be scored first using a grid that assesses a number of key attributes. This is set out below.

Technical Proposals Scoring Grid

<i>Criteria</i>	Sub- criteria score	Max. score for each criteria
Understanding the FinScope survey objectives and soundness of the proposal		45
<ul style="list-style-type: none"> ▪ Addressing the challenges and all tasks mentioned in the scope of work, including any comments on these ToR 	20	
<ul style="list-style-type: none"> ▪ Originality and suitability of the proposal 	25	
Professional competence and experience		55
<ul style="list-style-type: none"> ▪ Relevant professional qualifications 	10	
<ul style="list-style-type: none"> ▪ Experience in broadcasting and publishing campaigns in Tanzania 	15	
<ul style="list-style-type: none"> • Established relationships within media houses and related organisations in Tanzania 	15	
<ul style="list-style-type: none"> ▪ Experience in working in multimedia teams 	15	
Total		100

To be considered further, a minimum total technical score of 68/100 is required. Only financial proposals from bidders scoring at least that level will then be evaluated.

The total financial cost in US\$ will be weighted according to the formula:

- (Lowest total financial cost/ Bidder's total financial cost) x 0.2
- Total technical marks weighted by a factor of 0.8.

The weighted technical and financial scores for each proposal that passes the minimum technical threshold will then be added to produce a total score. The preferred bidder will be the one producing the highest total combined score.

All bidders will be informed of the combined weighted scores for all proposals that pass the minimum technical threshold. The FSDT will also separately inform the bidder of any proposal that fails to meet this threshold.

Any queries relating to this ToR should be submitted in writing to FSDT under the following address:

Neema Mosha,
Financial Sector Deepening Trust,
400 De Ocean
Cnr of Ohio Street & Garden Avenue,
P.O. Box 1559 Dar es Salaam, Tanzania
nmwakiluma@deloitte.co.tz

These questions and the answers will be shared with all short listed candidates. The deadline for any queries is 2 days before the proposal submission deadline date.

13.2 FINANCIAL

This will be a fixed priced contract. Financial proposals should be quoted in US dollars set out in the following format:

<i>Component</i>	Units	Rate	Total (US\$)
Person-days of consultant (fee)			
Travel within Tanzania (air and ground)			
Hotel nights			
Daily subsistence for travel outside Dar es Salaam (includes food and drink)			
Communications and internet access			
Total Expenses			
Total Cost			

Daily rates for hotels and subsistence are fixed by FSDT policies. Consultants are free to stay in more expensive hotels, but the additional cost will be at their own expense. The FSDT's daily subsistence rates for Dar es Salaam and other parts of Tanzania are shown in Appendix A.

The actual time spent on field trips should be included in the person-days, but the location and therefore the final expense budget will be agreed with FSDT before the start of field work. Nonetheless, consultant is required to put in expenses based on the estimated time spent on field trips and the detailed unit costs shown on Appendix A.

Financial proposals should be denominated in US dollars. This consultancy will be subject to local taxes financial proposals will be evaluated on a basis net of any local taxes.

14. OTHER MATTERS

14.1 CONFIDENTIALITY

All information contained in the terms of reference and attachments is provided on a strictly confidential basis solely for the use of Tenderers in connection with a competition for the supply of services for the above contract. It is a condition of this competition that Tenderers (and any sub-contractors) shall:

- take all reasonable measures to protect this confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information;
- not use this information other than for the purposes of preparation of a tender, and shall disclose it only to officers, directors, or employees on a specific need to know basis; and
- not disclose, publish or otherwise reveal any of the information contained herein except with the specific prior written authorization of FSDT.

14.2 CONFLICT OF INTEREST

Tenderers (and any sub-contractors) must disclose in their tender details of any circumstances, including personal, financial and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where Tenderers identify any potential conflicts they should state how they intend to avoid such conflicts. FSDT reserves the right to reject any tender which, in its opinion, gives rise, or could potentially give rise to, a conflict of interest.

15. TAXATION MATTERS

The Consultants will be responsible to pay withholding tax and all other tax liabilities as per Tanzanian Tax laws. Any such tax amounts shall be the responsibility of the consultant.

APPENDIX A - FSDT ACCOMMODATION RATES FOR BED & BREAKFAST BASIS (in US\$) AND DAILY ALLOWANCES (IN TSh)

Group A Dar es Salaam Arusha Mtwara	US\$ 200.00
Group B Mwanza Zanzibar Mbeya	 170.00
Group C Tanga Dodoma Morogoro Iringa	 150.00
Group D Any other place not mentioned above	 130.00

DAILY ALLOWANCES (in TSh)

Groups	Lunch	Dinner	Incidental	TOTAL (TSh)
A&B	25,000.00	40,000.00	35,000.00	100,000.00
C&D	20,000.00	30,000.00	25,000.00	75,000.00