

## **TERMS OF REFERENCE**

### **CONSULTANCY: COMMUNICATIONS FOR THE CARIBBEAN INVESTMENT FORUM IN THE BAHAMAS**

#### **1. BACKGROUND INFORMATION/RATIONALE**

##### **1.1 Relevant background**

The Caribbean Export Development Agency (Caribbean Export) in collaboration with the European Union, the Government of the Commonwealth of the Bahamas, and the CARICOM Secretariat will be hosting the Caribbean Investment Forum (CIF) in The Bahamas in October 2023.

The hosting of the Forum will serve to:

- Generate investment into priority sectors in the Caribbean;
- Build partnerships with key business entities, that can be sustained over time;
- Promote the Caribbean as a place for investment;
- Showcase opportunities/areas for investment;
- Showcase successful investment in the Caribbean;
- Engage potential investors and financing institutions regarding their interest and requirements for investing in the opportunities;
- Pitch specific ventures to specific investors;
- Increase the Caribbean's insertion into the global business community through the creation of links with journals, newsletters, key influencers and networks; and
- Work towards attaining the sustainable development goals focused on no poverty, zero hunger, good health and well-being, decent work and economic growth, life on land and partnerships.

The focus for this event will be placed on presenting bankable investment opportunities in projects and sectors that are a priority for the region as it recovers from the COVID-19 pandemic and seeks to fast track the transition to a GREEN-er and SMART-er economy.

Priority sectors will include agribusiness (with a focus on AgTech), IT enabled services (digitalizations/digital economy), the blue economy, the green economy (including renewable energy) and logistics and transportation, to name a few.

To support the effective implementation of this event an experienced marketing and communications agency is required to support the production of the Caribbean Investment Forum – Bahamas including the development of the communications strategy to support event participation.

### **1.2 Contracting Authority**

The contracting authority for this assignment is the Caribbean Export Development Agency and it is funded by the 11<sup>th</sup> EDF Regional Private Sector Development Programme.

### **1.3 Beneficiary Countries**

The primary beneficiaries under this project are the Caribbean Investment Promotion Agencies and the Private Sector in the following territories: Anguilla, Antigua & Barbuda, Aruba, Bahamas, Barbados, Belize, the British Virgin Islands, the Cayman Islands, Curacao, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Montserrat, Saint Lucia, Sint Maarten, St. Vincent & the Grenadines, Suriname, Trinidad & Tobago, and the Turks and Caicos Islands.

### **1.4 Target Groups**

Private sector organisations, business support organisations and investment promotion agencies in beneficiary countries.

## **2. OBJECTIVE, PURPOSE & EXPECTED RESULTS**

### **2.1 Overall Objective**

The overall objective of the Consultancy is to promote the Caribbean Investment Forum by raising the profile of the event in the international market through effective marketing and public relations.

### **2.2 Specific Objectives**

The specific objectives of this assignment are to develop and implement a robust communications strategy for the Caribbean Investment Forum creating a suite of promotional materials.

### **2.3 Purpose of consultancy and expected results**

The purpose of the Consultancy is to raise the profile of the Caribbean Investment Forum through effective marketing, promotions and public relations that supports the profiling of the event as a leading Forum for the Caribbean. It is expected that this consultancy will support the securing of sponsors and help to generate ticket sales for the event.

### **3. ASSUMPTIONS AND RISKS AND MITIGATION**

#### **3.1 Assumptions**

- There are suitable consultants/agencies available with the capacity to execute all aspects of the consultancy.

#### **3.2 Risks**

- The above assumption is not met.

#### **3.3 Mitigation**

- Additional internal human resources will be allocated to support this effort.

### **4. SCOPE OF WORK**

#### **4.1 Specific Activities**

The consultant is expected to carry out the following activities amongst others.

##### **Event Marketing and Promotions**

Lead the development and implementation of a communications strategy that includes but is not limited to the following:

- a. Refresh the event identity using the current promotional logo.
- b. Update and maintain the event website for the Caribbean Investment Forum.
- c. Develop all promotional materials e.g. e-flyers, promotional video/s, e-brochures, web banners etc.
- d. Develop and implement an integrated communications campaign including public relations and social media.
- e. Public relation activities such as writing media releases and articles for circulation and placement with international and local news outlets, investment industry media outlets or niche groups that may have an interest in the Caribbean Investment Forum.
- f. Prepare media invites to both local and regional media and work towards confirming their coverage/attendance at the event.
- g. Secure guest appearances with relevant media outlets leading up to the event.
- h. Develop artwork for event signage and material e.g., physical and digital banners as necessary for the venue; event agenda.
- i. Develop the official publication for the CIF2023 event.
- j. Create content during the event for future promotional use.

## **4.2 Budget**

The indicative total budget for the communications of this project is \$60,000 USD.

## **5. PROJECT MANAGEMENT AND REPORTING**

### **5.1 Responsible Body**

Caribbean Export Development Agency

### **5.2 Management structure**

The Executive Director will retain overall responsibility for the project. Day-to-day supervision of this specific programme is the responsibility of the Manager (Ag) – Partnerships, Advocacy and Reporting, who will communicate progress to the Executive Director.

### **5.3 Reporting**

- Inception report outlining the overall strategy and implementation plan.
- Monthly report outlining activities completed for the month and any challenges or issues.

### **5.4 Deliverables**

- Communications strategy and implementation plan.
- Event promotional materials including sponsorship packages, e-flyers, brochures and promotional video/s.
- Press releases and/or articles (min. of 10).
- Event signage.

## **6. LOGISTICS AND TIMING**

### **6.1 Commencement date and period of implementation of tasks**

This consultancy is expected to start June 1, 2023 and end November 30, 2023.

## **7. PAYMENT TERMS**

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the progress report and appropriate invoice. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and the consultant.

## **8. REQUIREMENTS**

### **8.1 Work Experience**

- Demonstrated experience managing high-profile events including communications (Please provide some evidence of at least 3 events that have been executed in the past 8 years);
- Demonstrated experience implementing event websites (Please provide some evidence of at least 3 events that have been executed in the past 8 years);
- Demonstrated experience creating event materials;
- Demonstrated experience in location marketing;
- Experience working with and in the Caribbean would be an asset.

### **8.2 Required Documentation**

- The Applicant must submit technical and financial proposal together with the completed [Applicant Declaration Form](#) to Ms. JoEllen Laryea, Manager (Ag) – Partnerships, Advocacy and Reporting at [jlaryea@carib-export.com](mailto:jlaryea@carib-export.com) and copied to [dbrathwaite@carib-export.com](mailto:dbrathwaite@carib-export.com) no later than 9:00 am AST on May 11, 2023.

### **8.3 Office Accommodation**

Office accommodation will not be provided by the Executing Agency.

### **8.5 Facilities to be provided by the Consultant**

None.

### **8.6 Equipment**

The consultant is expected to utilise his/her resources to ensure the adequate fulfilment of the scope of services. This includes utilisation of his/her camera, computer, telephone services, internet, among others.

### **8.7 Travel**

No travel is expected for this consultancy.

## 9. REPORTS

### 9.1 Reporting requirements

- Inception report outlining the overall strategy and implementation plan.
- Monthly reports outlining activities completed for the month and any challenges, issues and remedial action taken.
- Final Report, detailing achievements and providing recommendations for future actions.

### 9.2 Submission and Approval of Reports

The reports and deliverables as referred to above must be submitted to the Manager (Ag) – Partnerships, Advocacy and Reporting. All reports must be submitted in English in electronic format. The Executive Director is responsible for approving the reports.

## 10. EXCLUSION CRITERIA

Candidates will be excluded from participation in the bidding process if they:

- a) are bankrupt, insolvent, filing for insolvency or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) are the subject of proceedings for fraud, corruption, a declaration of bankruptcy, for winding-up, for administration by the courts, for an arrangement with creditors or for any similar procedure provided for in national legislation or regulations;
- c) have been convicted of an offence concerning professional conduct by a judgement which has the force of *res judicata*;
- d) are guilty of grave professional misconduct proven by any means which Caribbean Export can justify;
- e) are guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in the procurement process; they have been declared to be in serious breach of contract for failure to comply with obligations in connection with another contract with the same Contracting Authority or another contract financed with Caribbean Export's funds;
- f) are in breach of payment of taxes or social security contributions;
- g) have been convicted or are the subject of proceedings for money laundering, terrorist offences or activities, child labour, human trafficking, being a criminal enterprise in the production of goods and services, or any other irregularity;
- h) are established as or operating as a shell company.

A derogation from the mandatory exclusion clauses provided above, may be provided on an exceptional basis, for overriding reasons to entities operating in the public interest such as public health or protection of the environment.

#### **11. MONITORING AND EVALUATION**

The Consultancy will be monitored and evaluated by Caribbean Export over the duration of the project. Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 5.3 and 5.4, and as outlined within the work plan submitted in the inception report. Feedback, other than acceptance, on each submitted deliverable is not a requirement for the continuation of the project. However, in some instances the Consultant may need to integrate any feedback into the subsequent deliverables. The Contracting Authority will provide feedback to the consultant within ten (10) working days of receipt of the final report.

#### **12. SPECIAL REQUIREMENTS**

Any special requirements which the Consultant must take into consideration in the conduct of the Consultancy.

#### **13. PUBLICATION OF INFORMATION**

To participate in any activity executed or supported by Caribbean Export, you hereby agree that any information and personal data that you share and is collected by the Agency will be processed for the purpose of reporting the outcomes and impact of your projects and/or participation. Please note that Caribbean Export reserves the right to publish the Contractor's/Participant's name and address, the purpose and nature of the activity, and financial arrangements, in accordance with Caribbean Export's Personal Data Protection Policy. ([Personal Data Policy | Caribbean Export \(carib-export.com\)](#)). Derogation from publication of this information may be granted if it could endanger the Contractor/Participant or harm his/her commercial interests.

#### **14. DECLARATION**

To participate in any procurement undertaken by Caribbean Export, all applicants must complete and submit to the agency the Applicant Declaration Form ( [Applicant Declaration Form](#) )