

## **TERMS OF REFERENCE**

### **Development of Conference and Event Management Application for the Caribbean Investment Forum**

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

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

The Caribbean Export Development Agency (Caribbean Export) in collaboration with the Government of the Commonwealth of the Bahamas, the CARICOM Secretariat along with other stakeholders, will be hosting the 2<sup>nd</sup> annual 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 in discussing 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 and key influencers and networks in that society; 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.

Much like the inaugural CIF, the 2023 edition will feature the presentation of bankable investment opportunities in projects and sectors that are a priority for the region as it seeks to boost its transition to a GREEN-er and SMART-er economy with green investments. The priority sectors for this event are agribusiness (with a focus on AgTech), the green economy, including renewable energy and logistics & distribution, IT enabled services and transportation. The aim is to build on the successes of the first event by continuing the dialogue on the value proposition of the region in the priority sectors as well as between investors and business persons in the Caribbean.

To support the successful execution of the project and to realise project goals of attracting investment into the Caribbean, an investor lead generation firm is being sought to identify and confirm the participation of potential investors.

### **1.2 Contracting Authority**

The contracting authority for this assignment is the Caribbean Export Development Agency.

### **1.3 Beneficiary Countries**

The primary beneficiaries under this project are Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent & the Grenadines, Suriname, Trinidad & Tobago.

### **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 general objective of this assignment is the hosting of an investment conference that seeks to showcase to investors investment opportunities available in the Caribbean. Moreover, as a premier platform for business-to-business engagements, this event seeks to secure long-term partnerships from global players that will assist in sustaining the investment promotion effort of Caribbean Export.

### **2.2 Specific Objectives**

Specifically, this assignment seeks to retain the services of a Conference Platform firm to provide access to a web-based conference management platform that is customized to meet the needs of the Caribbean Investment Forum scheduled for the Bahamas in October 2023.

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

A conference management platform with the following minimum features for the Caribbean Investment Forum:

- Registration of minimum 600 attendees and related payment gateway that is globally recognized
- Host meeting agenda; speakers images and profiles
- Multiple language enablement (via closed-caption)
- Attendee directory with ability to build-out individual profiles
- Business match making, meeting scheduling and chat function
- Onsite registrant badge printing (including equipment rental)
- Download link to presentations and on-demand session viewing

- Poll and feedback survey
- Automated event reminders, prompts and push notifications
- Automated data management and event analytics
- Marketing and promotional opportunities (ability to receive display logos)
- Mobile friendly

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

#### **3.1 Assumptions**

- The design solution can deliver a seamless user experience
- There is sufficient time to develop the application

#### **3.2 Risks**

- The above assumptions are not met.

#### **3.3 Mitigation**

- Feedback from the inaugural event will be important in seeking to improve user experience.

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

#### **4.1 Specific Activities**

The consultant is expected to deliver the following:

A conference and event web application that has the minimum features:

- Registration of minimum 600 attendees and related payment gateway that is globally recognized
- Host meeting agenda; speakers images and profiles
- Multiple language enablement (via closed-caption)
- Attendee directory with ability to build-out individual profiles
- Business match making, meeting scheduling and chat function
- Onsite registrant badge printing (including equipment rental)
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## 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, Competitiveness and Export Promotion, who will communicate progress to the Executive Director.

### 5.3 Reporting

The following reports are required:

- **Inception Report:** to be produced one week following the inception meeting where final features and capabilities of the application will be confirmed. This report should include the (a) proposed project plan, (b) agreed features and capabilities (c) work breakdown structure, (d) project schedule, (e) detailed budget and (f) risk mitigation, should there be any foreseen difficulties.
- **Monthly Progress Reports:** Monthly progress reports on the development and delivery of the customised technology solution based on agreed features and capabilities. The reports should include the link or back-end view demonstrating the development of the application in meeting the deliverable.
- **Final Report:** This report should include the event analytics or reporting including list and number of attendees by type, meetings held, investment opportunities showcased etc. The report should be submitted within two weeks after conclusion of the event.

## 6. LOGISTICS AND TIMING

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

This consultancy is expected to start **June 21, 2023** and end **November 15, 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.

The following payment terms are proposed:

- Upon presentation and acceptance of Inception report, 30% of the total cost will be paid;
- Upon presentation and acceptance of Monthly reports, 30% of the total cost will be paid; and
- Upon presentation and acceptance of Final report, 40% of total cost will be paid.

## **8. REQUIREMENTS**

### **8.1 Work Experience**

- Demonstrated experience in design and development of web-based solutions such as conference and event applications.
- Demonstrated experience in delivering customized solutions as per minimum features identified.
- Demonstrated experience in use of event and conference apps, with a particular focus on location marketing and the use of social media to generate interest.

### **8.2 Required Documentation**

The Applicant must submit technical and financial proposals **in EUROS**, together with the completed [Applicant Declaration Form](#) to Mrs. Natasha Edwin- Walcott, Senior Advisor – Competitiveness and Export Promotion at [nwalcott@carib-export.com](mailto:nwalcott@carib-export.com) and copied to Dr. Damie Sinanan, Manager, Competitiveness and Export Promotion at [dsinanan@carib-export.com](mailto:dsinanan@carib-export.com) **no later than 4:30 pm AST on Friday June 16, 2023.**

### **8.3 Office Accommodation**

Office accommodation will not be provided by the Executing Agency.

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

None

### **8.5 Equipment**

The consultant is expected to utilise his/her resources to ensure the adequate fulfilment of the scope of services.

### **8.6 Travel**

A global priced contract is anticipated, that is, all travel expenses must be included in the overall budget. Reimbursements will not be considered.

## **9. REPORTS**

### **9.1 Submission and Approval of Reports**

The reports and deliverables noted in Section 5.3 must be submitted to the Senior Advisor – Competitiveness and Export Promotion. 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 4.1, 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. <https://content.carib-export.com/download/applicant-declaration-form/>.