A REQUEST FOR EXPRESSION OF INTEREST FOR - THE BRAND AUDIT AND PERCEPTION SURVEY OF PIND

1 BACKGROUND

Foundation for Partnership Initiatives in the Niger Delta (PIND) is a Nigerian non-profit Foundation established in 2010 with initial funding by Chevron Corporation to support a portfolio of socio-economic development programs for Nigeria's Niger Delta in order to improve standards of living of communities in the region. PIND supports projects in collaboration with a diverse range of donor partners including bilateral and multi-lateral aid agencies, federal and state government agencies in Nigeria, private companies and foundations. With an overarching goal of increasing income and employment in the region, the Foundation has four distinct but interrelated program areas. They are:

- An **economic development program** focused on generating opportunities for pro-poor market development and employment generation.
- A **capacity building program** that will build the service delivery and engagement capacity of government, civil society and communities.
- A **peace-building program** that strengthens conflict resolution mechanisms for enabling integrated peace and economic growth.
- An **analysis & advocacy program** that improves analysis and understanding of systemic constraints to growth in the Niger Delta region.

Branding is a process of creating a unique name and identity for an organization in the mind of its stakeholders with the aim of establishing a significant and differentiated presence in the market that attracts stakeholders to it. Brand identity helps to describe who an organization is, what it stands for and why it is important - It shows why and how an organization is making a difference and how it differs from other players within that sector or field. The brand image builds emotions and feelings about an organization in the hearts and minds of external stakeholders when they think of an organization.

Developing a brand is always a negotiation between what brand space is available so it is important for PIND to understand its competitors' brands in order to understand what is honestly differentiating about it. Finding what makes PIND different also ties directly to 'what would give PIND a greater presence and profile in the Niger Delta and in Nigeria'. When brand identity is aligned with organization's mission and values and brand image, a non-profit brand is able to establish a clear, distinct, consistent and credible position in the minds of both internal and external stakeholders.

In 2015-2016, PIND undertook a brand audit that aimed to answer the following key questions:

- How sure are we that what we think makes us different actually makes us different?
- Who else, in the development sector in Nigeria, is doing "different" work and how?
- What is PIND's value proposition?
- When people think about PIND, what are the feelings and associations do we want them to have? Are they unique?

- How is our brand aligned to PIND's mission, vision, values, and stakeholder groups?
- What kind of personality should the PIND brand have? Online and off.

Following the audit findings, PIND developed a brand strategy and adapted its communications to align with the recommendations. As the Foundation prepares for a new strategic phase, it becomes necessary to ascertain PIND's brand health and the effectiveness of its stakeholder's communication and ways to improve on it through a new brand/communications strategy and plan for its next strategic phase.

PIND's specific reason for branding is to build our Influencing Identity. PIND aims to be the 'go to' organization in the Niger Delta by attracting quality partnerships. To this, it wants to position/brand itself as a must invite organization to any conversations and development projects in the Niger Delta or where discussion is going on about the Niger Delta. To do this, PIND needs to build its influencing identity and increase level of awareness of its work, impact, tested models and learnings so its influencing role can grow. PIND wants:

- Investors to invest in PIND and the Niger Delta
- Partners to desire partnership with PIND
- Business and development actors desire to participate in PIND activities
- Its tested successful program models to be replicated and scaled up by other development actors

Through the branding, it wants to create a 'band wagon effect' that will make people want to join or partner with the Foundation.

2 Purpose of Assignment

The primary purpose of the Brand Audit and Perception Survey is to help the Foundation understand how the PIND brand (name) is perceived in the mind of its different stakeholders (donor, partners, media, beneficiaries, long-term consultants, and others) as compared to how PIND sees and defines itself and to use the findings to develop PIND's future communication/branding strategy and plan as well as visual style guide.

A related objective is to, through mainstreaming a communications needs and preferences assessment into the survey, determine the most effective ways to reach PIND stakeholders with information about what PIND is, what it offers to the development community and more. The emphasis is on gaining insights into compelling messages and the most effective channels for communicating with different key stakeholders about PIND and integrating these into the new communications strategy/plan.

3 Scope of Work

The brand audit/perception assessment will assess the effectiveness of PIND's branding and communications approaches/methods. The review will include an audit of current internal and external communications work and how they add to/subtract from PIND brand perception, including cross cutting issues of gender.

Sub-Brands: The audit will also look at PIND's sub-brands (NDLink, CAPABLE, ATED, NDDF and P4P) which have been deliberately built to address specific project needs. They have their own identity and the audit will look at how these two sub-brands fit into the overall PIND parent brand and how they support overall organizational brand and how they are connected to it in such a way that they contribute to building the strength of the PIND organizational brand. It will x-ray how they relationship between the sub-brands and PIND are communicated and perceived by stakeholders

Specifically, the brand audit and perception survey is intended to identify the following four factors:

1. Cognitive – the concepts that stakeholders associates with PIND
2. Emotional – the feelings that stakeholders associates with PIND
3. Language – how stakeholders describe PIND
4. Action – the experiences stakeholders has with PIND

The brand perception survey will assess PIND brand recall, brand recognition, brand identity, brand image, brand trust, brand loyalty and stakeholders' profile. Additionally, the audit/survey will include a survey of PIND stakeholders' communications habit and preferences that will further inform the new communications strategy

PIND will welcome Consultant to propose methodologies and approaches they feel will help clearly bring about the objectives of the audit/perception survey as well as respond to the key information areas outlined. It is expected that Consultant will submit detailed methodology including data collection tools, work plan, details of sampling strategy and size, and analytical framework for the brand audit/perception survey. PIND will agree and finalize the management and coordination arrangements for the evaluation after Consultants have been selected.

This brand audit and perception survey will involve qualitative and quantitative methods and will make and use the recommendations to inform new products for PIND's next strategic phase. It is the sole responsibility of the Consultant to deliver the following:

1. Inception report
2. Draft and final reports of the audit/survey
3. A proposed communications strategy/plan that aligns with the findings for PIND's next strategic phase
4. An updated PIND style guide document aligned with the audit/survey findings and the proposed communications strategy/plan

The Consultant will use methodologies and techniques as determined by the specific needs for information, the objectives set out in the TOR, the availability of resources and the priorities of stakeholders. In all cases, the Consultant is expected to analyze all relevant information sources, such as communication collaterals, project documents and reports and any other documents that may provide evidence on which to form opinions.

The Consultant is also expected to use interviews as a means to collect relevant data for the evaluation. In order to use existing sources/information and avoid duplication, secondary data will be mainly collected from various information sources through a comprehensive desk review that will include the analysis of relevant documents, information, data/statistics, triangulation of different sources etc. Data will also be collected from stakeholder key informants through interviews, discussions, and surveys.

The methodology and techniques to be used in the brand audit/perception assessment should be described in detail in the inception report and the final assessment report, and should contain, at a minimum, information on the instruments used for data collection and analysis, whether these be document, interviews, field visits, questionnaires or participatory techniques.

The brand audit and perception assessment will be carried out through a wide participation of all relevant stakeholders including the PIND team, partners, beneficiaries, donor, media etc. Field visit for data gathering is not anticipated except absolutely mandatory while briefing and debriefing sessions with PIND are envisaged. Data collected should be disaggregated (by sex, age and location), where possible and necessary.

The Consultant is expected to propose a Research Assistant to support him or her in the data collection, transcription and analysis as part of the bid for the assignment. The profile (CV) and cost of the Assistant must be included in the bid as this would be part of the evaluation and selection criteria.

4 ACTIVITIES AND TIMELINE

Time inputs for the consultant are in the table below. The scope of work above is broken down to key activities, with the total number of days required to deliver each:

Description of activities		**Day input**	**Associated Deliverables**
T1.	Preliminary meetings with *relevant* PIND Foundation officers in charge of Communications. (First, a 0.5-day briefing meeting to clarify objectives and scope of work. Second, a presentation of brand audit/perception assessment methodology/protocol to PIND. The second 0.5-day meeting will come at least 3 days after the Consultant have developed and submitted inception report. *Each meeting will not be more than 0.5 day*)	1	Not applicable

T2.	Draft inception report, including brand audit/perception assessment methodology and tools	2	D1
T3.	Desk review of related documentation and materials Data collection from select stakeholders both at national and regional level	7	D2
T4.	Review and synthesis of data to identify key themes and patterns	3	Not applicable
T5.	Make presentation of evaluation findings to PIND Foundation	0.5	D3
T6.	Draft and finalize brand audit/perception assessment report	4	D4
T7.	Develop a new 4-year Communications strategy and plan for PIND that aligns with the findings and recommendations from the brand audit/perception assessment	5	D5
T8	Update PIND's branding visual style guide and strategy	3	D6
	TOTAL DAYS	25.5	

5 DELIVERABLES

Deliverables stated in the table below are directly linked to specific tasks in previous section. Due dates are tentative and dependent upon contract execution by mid-April.

Item		**Due date**
D1.	Draft and final inception report	April 2019
D2	Transcript of stakeholder interviews to be submitted along with final report *Relates to T3*	May 2019
D3.	PowerPoint decks of headline results, including the methodology, limitations and recommendations Presentation of headline results and recommendations to PIND *Relates to T4-T5*	May/June 2019

D4	D4 A well-written draft brand audit/perception assessment report. Written in English for a non-academic audience. Final brand audit/perception assessment report, inclusive of summaries and conclusions. ***See Annex 1 for outline of report*** *Relates to T6*	June 2019
D5.	A simple and articulate 4-year Communications strategy and plan for PIND that aligns with the findings and recommendations from the brand audit/perception assessment and which is SMART *Relates to T7*	June 2019
D6	An updated brand document that highlights PIND brand attributes, key messages, positioning, identity elements and image An updated visual style guide document and sample visual styles and templates that represents the brand identity *Relates to T8*	June 2019

6 DURATION

The Consultant in discussion with PIND Foundation will agree to a suitable timeline and schedule for the brand audit/perception survey. The activities are expected to be carried out within from mid-April to end of June 2019 with contract closed out at no later than October 31, 2019.

7 COSTS

The interested individual(s) or firms will propose daily fees for the assignment which shall be subject to PIND's procurement rates. Payment can be one-time upon submission of all deliverables or in two instalments in the following order, depending on the preference of the Consultant:

First tranche: Completion and approval of D1 – D4
Second tranche: submission and approval of D5 and D6

PIND Foundation will provide any logistics requirements (transport/accommodation/feeding) that may arise in the course of the assignment.

8 QUALIFICATIONS / SELECTION CRITERIA

Given the objectives, scope of work and expected outputs of this engagement, the Consultant is expected to possess relevant qualifications and extensive work experience in brand and marketing communication, development communications and conducting communications and brand audits, with a good understanding of non-profit sector communications dynamics.

Preference will be given to individuals or firms with evidence of undertaking similar task. The consultant should have the following qualifications and experiences;

- A proven academic and professional record, with extensive knowledge and experience in the fields of corporate, branding, marketing and development communications.
- At least eight years of experience in Brand and communications research and strategy development
- Strong critical analysis and demonstrated excellence in preparing reports in a clear and concise manner.
- Ability to communicate effectively with and relate to people of different cultures, demonstrating ability to see issues from others' perspectives.
- Availability to complete the work before **30 June 2019**.

9 How to Apply

Interested persons or firms should submit the following application documents to procurement@pindfoundation.org no later than Wednesday 10th April 2019 to

A. Expression of interest (maximum 4 pages sides of A4) a) detailing how the Consultant(s) meets the selection criteria and b) their understanding of the TOR and methodology.
B. Copy of CV of the consultant(s) who will undertake the brand audit/perception survey and strategy development (maximum 6 sides of A4 each);
C. Financial proposal detailing consultant(s) itemized fees;
D. One recent example of similar report written by the applicant (if joint authored to include a description of the role of the named consultant(s) in the report);
E. Contact details of two independent referees

In addition, these mandatory items MUST be submitted along application documents:

1. Certificate of business registration (for firms) / Means of personal identification (for individuals)
2. Profile of organization or CV of the individual consultant(s) as in B aforementioned
3. Most recent Tax clearance certificate
4. Tax identification number
5. Full physical contact address
6. Bank reference letter
7. Bank details as follows:
    i. Name of Account
    ii. Account Number
    iii. Name of Bank
    iv. Address of Bank

Non-Discriminatory Clause:
PIND Foundation provides equal opportunity in employment and engagement for all persons, vendors and contractors, and prohibits unlawful discrimination and harassment in all aspects of contractual engagement or employment because of age, sex, gender, marital status, disability, nationality, race, religion or any fact.

Annex 1: Brand Audit & Perception Survey Report Format

Title Page: Title, Address of PIND Abuja Office, Name of Primary Contact, Name of Assessor, Time-frame of evaluation, Date of Report, Name of Organization commissioning evaluation, PIND Logo

Table of Content: Main headings and page numbers

Executive Summary (3 pages): A description of the assignment

- A description of the purpose of the brand audit/perception survey and the objectives
- Main audiences and users of the review findings
- A short description of audit methods
- Short summary of key findings, conclusions and recommendations

Introduction (1 page): Explanation of the context in which this brand audit/perception survey was conducted.

- A description of why the brand audit/perception survey was conducted (purpose) and why is it being conducted at this particular point
- A description of who the primary audience and users of the brand audit/perception survey

PIND Organizational Overview (2-3 pages): This section of the report is to provide enough information to the user or reader about PIND in order for them to understand the brand audit/perception survey results.

Brand audit/perception survey Methodology (1-2 pages): brand audit/perception survey Scope: name of geographical areas, data gathering time period

- Data Sources: Type of data collected (Documents, Surveys, FGDs, KIIs)
- brand audit/perception survey Team and corresponding responsibilities
- Ethical considerations
- Limitations to methodology

Key Findings (10-15 pages max): In this section the brand audit/perception survey questions must be answered using evidence and data. This section should be structured in a way that the reader can easily make connections between the purpose of the brand audit/perception survey and the data gathered.

- Include if there is any variances between planned and actual results
- Assumptions or risks should also be stated

Conclusions (1-2 pages): Summarize any overarching lessons learned and insights gained, for instance what new knowledge was gained about the PIND brand and about PIND's brand and communications particular intervention that can be applicable in similar contexts

- Highlight strengths and weakness of the PIND brand and about PIND's brand and communications
- Conclusions should be based on evidence and address the PIND brand audit/perception survey questions

Recommendations (1-2 pages):

- Practical, feasible recommendations for the intended users (PIND Communications Team, Executives or others) should be included.
- Proposed additional brand monitoring activities and an indicative budget for such.

- Recommendations should be supported by evidence gathered and linked to conclusions related to key brand audit/perception survey objectives
- Recommendations should be action oriented

Annex 2: Proposed format for drafting the Practice Papers

SUMMARY (not more than 5 pages)

Overview of approach

- Highlighting innovative aspects of how NDYEP has worked in this area / sector and signposting further detail in the main section of the paper

Key programmatic lessons

- Description which summarize the key lessons or key principles in a practical 'do' and 'do not' way

Options for action / Programme entry points

- Recommendations focused on as wide as possible application for different types of programs (see below Main Report). Note this does not have to be tabulated and it may not be appropriate to label the different levels explicitly (unless it is appropriate to do so) but NB to have in mind wide and different levels of applicability, and encouragement to adopt these approaches, as you develop Recommendations.

MAIN PAPER (Between 10 – 15 pages including tables, avoiding annexes – use references instead)

1. **The approach of NDYEP in this area / sector and how theory/learning/methodology was applied to programming**
   - Could include how NDYEP has taken theory e.g. social network theory and applied/adapted it to the intervention and context
   - Could include key principles relevant to this area of programming and how NDYEP has put principles into practice across the project in a purposeful way

   [Examples of principles might be: modelling multiple pathways to employment; strengthening the ecosystem of actors; understanding and responding to context is critical; work on gender as power etc.]

2. **Application – Steps in program design and key lessons learned at each step [This is the main part and bulk of the paper and could include boxed illustrations, quotes, photos etc.]**

   A step-by-step on how NDYEP has implemented the approach outlined in #1 and drawing out lessons from the NDYEP experience such as:

   - What has changed, looking at the situation before and after NDYEP was involved.
   - What caused the change? What actions have taken place? How the changes have been achieved/happened? What other factors apart from NDYEP interventions led to the changes?
   - How the different actors have experienced the change, with a particular focus on hearing from those who have been reported by PIND and partners to have changeeed and those in their sphere of influence who are experiencing the change.
   - What seems not to work, and why?

   Detail any tools used and indicate how they were developed.

   [Break this down by the three potential levels of action below, where it is realistic to apply this – remembering to make it as widely applicable and relevant as possible at different levels and in different types of programs]

3. **Recommendations for entry points/different levels of action in this area / sector**

   The aim is to ensure widest possible applicability and encouraging others to adopt the approaches

Entry points	**Significant component**	**Fully integrated approach**
e.g. For programs wanting to pilot or do preparatory work/test the water in an area / sector	e.g. For programs wanting to implement significant spend on X/or capture X at the level of the logframe	e.g. For programs looking to adopt X as the main or central program approach

4. **Further resources**
   - Signpost to other PIND products from the wider list.

5. **Notes on house style**
   - Submit your draft reports in MS Word using Calibri pt 11 and 1.0 line spacing
   - Use endnotes rather than footnotes
   - Spell out acronyms on first use
   - Indicate panels by adding ‘PANEL’ to the sub head. **Do not** format panels using shading or broader
   - Use American English (rather than British) and ‘z’ endings (rather than ‘s’), e.g. organization. The exception is when keeping an organization’s name in the original spelling
   - Use ‘single quote marks’ as standard, but “double” for quotes within quotes (within main body of text) and direct speech.

Annex 3: Ethical Principles and Premises of the Evaluation

The mid-term evaluation of the NDYEP program is to be carried out according to ethical principles and standards established by PIND Foundation.

- *Anonymity and confidentiality*. The evaluation must respect the rights of individuals who provide information, ensuring their anonymity and confidentiality.
- *Independence*. The Evaluator should ensure his or her independence from the intervention under review, and he or she must not be associated with its management or any element thereof.
- *Integrity*. The Evaluator will be responsible for highlighting issues not specifically mentioned in the TOR, if this is needed to obtain a more complete analysis of the intervention.
- *Validation of information*. The Evaluator will be responsible for ensuring the accuracy of the information collected while preparing the reports and will be ultimately responsible for the information presented in the evaluation report.
- *Responsibility*. The report must mention any dispute or difference of opinion that may have arisen among the consultants or between the Evaluator and the reference group of the NDYEP program in connection with the findings and/or recommendations. The Evaluator must corroborate all assertions, and note any disagreement with them.
- *Incidents*. If problems arise during any work in the field, or at any other stage of the evaluation, the Evaluator must report these immediately to the PIND. If this is not done, the existence of such problems may in no case be used by the Evaluator to justify the failure to obtain the results stipulated by PIND in these terms of reference.
- *Intellectual property*. In handling information sources, the Evaluator shall respect the intellectual property rights of the institutions and communities that are under review.
- *Delivery of reports*. If delivery of the reports is delayed, or in the event that the quality of the reports delivered is clearly lower than what was agreed, the penalties stipulated in the Service Order will be applicable.