



CONSULTANCY TERMS OF REFERENCE

Main Facts Table	
RFQ reference	RFQ FY24 178- Global Brand Metrics
RFQ launch date	26 th October 2023
Consultants/suppliers submit questions	By 31 st October 2023
Plan answers questions	By 2 nd November 2023
Deadline for submission of offers	9th November 2023
Interviews	17 th – 21 st November 2023
Contract Award	24 th November 2023
Contract starts	26 th November 2023

Submission of offers to procurement@plan-international.org

Please include the RFQ reference “RFQ FY24 178 Global Brand Metrics” in all correspondence



1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And it's girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 85 years and are now active in more than 75 countries.

Read more about Plan International's Global Strategy: **Girls Standing Strong** at <https://plan-international.org/strategy>

About the commissioning office

Global Hub is the global headquarters of Plan International. We set the strategy for Plan International and support and serve all of our National Offices (NOs) and Country Offices (COs) to enable them to meet our strategic aims. The global brand function is a small team with a big remit – to drive brand awareness and preference for Plan International across all our markets.

2. Background/Context

We have been working on building a new Global Brand Strategy that will help to position Plan International as the organization that won't stop until we are all equal. Building on our work on equity and equality, we will continue the work we do with children – and especially girls – to ensure that everyone has the same chances to learn, lead, decide and thrive. No matter who they are or where they live.

We need to start measuring our overall brand health to get a benchmark of where we are now, and to track the success of our brand launch over time. This would be the first experience of brand health and brand measurement at a global level; there are some offices that have carried out brand and health measurements at an individual level, but we need a global panorama that will help us verify compliance with our brand strategy and adjust the actions necessary to improve our positioning over time. Previously, Plan International received brand research and insights to build a business case for the new global brand strategy. The key challenges identified were 1) low brand awareness, 2) fragmented brand and 3) need for strategic impact.

While the external brand will launch in January 2024, we will be activating our brand through a specially designed campaign called 'Beat the Clock' that will help to highlight our work in the context of a global gender equality clock that gives the amount of time until we reach gender equality as 131 years. We are currently running a pilot study in 6 markets: Australia, Brazil, Canada, Colombia, Indonesia and Irlanda, and hope to roll this out to a wider cohort of offices (but not all) for a full launch in early 2024.

Plan International's Global Hub are seeking a consultant or supplier to support with devising a strategy that will help us get global results, with a limited budget, across as many countries as possible. The main metric we are interested in measuring is global brand awareness, but we would be open to looking at additional/alternative metrics if they can give us the information, we need to start optimizing our activity to get better results.

We would be looking to run metrics initially twice over a calendar year, beginning in January 2024 and ending in January 2025.

3. Description & Objectives

Purpose

The purpose of this consultancy is to provide Plan International's Brand Team with tools and data that enable us to understand our global brand metrics (and the best way of measuring them across our broad organizational context, different types of offices and market and considering our limited budget), We also need a benchmark of our brand health prior to launching our brand work and implementation, so we are clear on the affect these activities have over time . We need strategic guidance to ensure that we are measuring the right metrics in the best way so that we are being cost-effective and enable the brand team to respond to learnings in agile manner.

Below are the questions/issues we are looking to address:

- What are the right metrics to measure, and how often?
- What is the right methodology to measure the metrics given the diversity of Plan International's offices?
- What is the best way to measure Plan International's current brand awareness?¹
- How can this be done in a cost-effective way?
- How can we measure brand globally without incurring the costs of running metrics in every market in which Plan operates? Are there proxy markets that can give us an estimation of our brand health in more than one market?
- How will external work (i.e our Brand Activation) affect our brand awareness and what is the best method to track that (Brand Lift Study or similar?)

The findings and data delivered by the Consultant will be used by the Global brand and Fundraising teams to inform future work. It will also be used as a proof point for investment in brand and the uplift it can bring to the overall brand health of the organization.

4. Deliverables and Timeline

Key Deliverables

- 1. Initial report/feedback:**
 - Advice and guidance on the selection of metrics and the best methodology and frequency of testing.
 - Which markets will give us the best representation of global brand health based on our unique operating environment?
 - How best to measure across markets participating in brand activation and those not to create meaningful learnings.
- 2. First Global brand measurement report**
 - Set an initial benchmark for the organization
 - Provide data driven intelligence on what is/not working across our brand activation, using comparative data from markets that are and aren't participating. Use this information to provide proof points for future campaigns.
 - Strategy and implementation plan for ongoing measurement of global brand awareness.
- 3. Second Global Brand measurement report**
 - Provide data driven intelligence on what is/n't working across our brand activation, using comparative data from markets that are and aren't participating. Use this information to provide proof points for future campaigns.
 - Strategy and implementation plan for ongoing measurement of global brand awareness.

Note that there are more than 75 offices, some of which are country offices that implement projects and raise funds locally, and some of which are national offices that raise funds.

Timeline:

Deliverable	Format	Deadline/due
Strategic/guidance report	Written ppt deck/word doc	By beginning of Dec 2023
Global Brand measurement report 1	Data driven report	By end of January 2024
Global Brand Measurement report 2	Data driven report	By end of December 2024 – (timing to be agreed by both parties once initial deliverable complete)

Note: At this stage the timeline is indicative and should support any external consultant in the development of their proposal and Inception Report. As part of the process, this timeline should be re-evaluated in consultation between Plan International and the consultant.

5. Expected qualifications of Consultant or Supplier

We would expect any consultant or supplier responding to this to have considerable experience in global brand measurement and to be able to show that they have a track record in producing meaningful and actionable data from markets that are included within Plan International's areas of work. Previous experience of working with similar INGO's would be desirable.

6. List of documents to be submitted with the RFQ

Document	Details	Format
Technical Proposal	<p>Please include:</p> <ul style="list-style-type: none"> ○ Company profile and contact details. ○ Consultant(s) CVs ○ Proposed methodology ○ Proposed project timeline including activities, deliverables and resources required per each activity line. ○ Case studies of previous work done for organisations in a similar field or those with a similar global scope ○ Demonstrate means to gather meaningful data across all global markets the Plan International operates in ○ Team who would be working with Plan International throughout the project 	Word or PDF – Max 10 pages
Financial Proposal	<ul style="list-style-type: none"> ○ Detailed budget including fees hourly or daily fees per each activity line 	Excel, word or PDF – Max 3 pages
Signed Non-Staff Code of Conduct	All consultants/applicant are required to agree and adhere to Plan International's Non-Staff Code of Conduct (Annex A)	

7. Submission of offers

Please send your application to Plan International procurement@plan-international.org by 23:50 (GMT) **9th November 2023** referencing “[RFQ FY24 178 Global Brand Metrics](#)” in the subject line and including support documents as outlined.

8. Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at Plan’s discretion.

Plan International, at its sole discretion, will select the successful RFQ.

Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Request for Quotations

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the supplier.

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply.

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

Plan International may award multiple contracts and all contracts will be non-exclusive.

9. Contract & Payment terms

Please note that, if successful, Plan International’s standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

10. IR35 Requirements – Only applicable for UK based or connections to the UK Consultants

As of April 2021, all Global Hub UK-based contractors (Consultant/personal service company/agency/intermediary) employing “people” in their chain to deliver serves to Plan International must follow a strict process of IR35 determination.

Plan Limited will conduct a CES tool on all relevant shortlisted proposers as outlined above to determine whether they fall inside or outside IR35.

11. Plan International’s Ethical & Environmental Statement

The supplier should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation (as applicable).

12. Clarifications

The onus is on the invited individual/companies to ensure that its offer is complete and meets Plan International’s requirements. Failure to comply may lead to the offer being rejected. Please therefore ensure that you read this document carefully and answer fully all questions asked.

If you have any queries in relation to your submission, or to any requirements of this RFQ, please email procurement@plan-international.org

Thank you for your proposal.