

**CONTRACT NO. : 3027**

**Terms of Reference (ToRs)**

**Public Relations Agency DIT Latac Marketing and Communications HUB**

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## SUMMARY OF REQUIREMENT

The Marketing and Communications Hub from the Department for International Trade (DIT) for Latin America and the Caribbean, seeks to appoint one Public Relations Agency as a Service Supplier for a FIVE-month period supporting activities led by the Hub.

**INTRODUCTION**

The UK’s Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy. DIT Latin America and the Caribbean has a network of over 100 staff across 17 countries to support UK companies to do business in the region.

These markets are divided as follows:

Large markets:

* Brazil
* Mexico

Medium markets

* Argentina
* Chile
* Colombia
* Peru

Smaller Markets

* Barbados
* Costa Rica
* Cuba
* Dominican Republic
* Ecuador
* Guyana
* Jamaica
* Panama
* Trinidad & Tobago
* Venezuela
* Nicaragua

DIT’s main purpose is delivering High Value Campaigns across different commercial sectors. HVCs are end-to-end delivery plans for Government to provide export promotion support in high priority areas.

For Mexico, the top priority sectors are Financial Services, Infrastructure (including Airports and Rail), Oil and Gas, Renewables, Automotive, Education and Life Sciences, Food and Drink, Agri-tech and Legal Services.

For Brazil: Advanced Manufacturing (Marine), Aerospace, Education Life Sciences and Sports.

One of the four DIT aims for this Financial Year (2018 – 2019) is **Promotion**, which will be taken as a priority for the Communications teams. We are looking to have a PR partner to help us increase our visibility and key messages led by Brazil and Mexico as regional champions.

## OBJECTIVE

To partner with a Public Relations agency that will support the regional Marketing and Communications Hub in the implementation of activities that include **media coverage,** **data base building, Press release distribution, Press invitations Interviews, Reporting and monitoring and Senior management positioning** in order to raise visibility of DIT services amongst priority sectors, in a 5 month period.

## METHODOLOGY

Deliver a project management proposal and implementation plan for the scope of work provided by the DIT Communications Manager,considering the above objectives and the following criteria.

* Appointment of an Account Manager (Other points of contact with contact details provided)
* Initial planning meeting scheduled with all key personnel meeting
* Agreement on a full plan detailing all obligations and who needs to provide what and by when
* Agreement of sign off methods and deadlines in reference to Comms materials, use of brand and deliverables for both parties
* Agreement of reporting methods
* Live event management and staff access and necessary security approvals
* Tracking and measurement methods
* Post project evaluation

The selected company will manage tasks and liaise directly with the Communications team in Mexico, occasionally and Brazil, and occasionally supporting other Latam posts such as Argentina, Colombia, Chile and Peru.

The company should have excellent credentials and meet the requirements mentioned in this document under ‘SKILLS AND COMPETENCES’.

**OUTPUTS / DELIVERABLES**

The proposal will consist of the followingelements:

1. Project management plan covering all aspects of the project, including:
2. Activity calendar with key dates clearly marked
3. Implementation tactics
4. Reporting and monitoring methods
5. Evaluation plan (KPIs mentioned in the next section)
6. Itemised budget (as per ATT4)
   1. All costs will be itemised – costs should be broken down by element of the project, and where possible per unit and/or measurement.
   2. All costs will be quoted in GBP inclusive of any applicable taxes and overheads.
7. Reports
   1. Publications and activity reports should be shared on the following periods.
      * + Fortnightly
        + Monthly
        + Trimester
        + Semester
        + Final report
8. Media lists data bases
   1. Media lists will be shared with DIT Communications Managers as a deliverable at the end of the project.

**EXPECTED TASKS**

The Successful Service Supplier(s) are expected to carry out the following tasks in the course of the scoping work:

1. **Account management**

* End-to-end management of the project, including:
  + Direct liaison with DIT Communications Managers in Mexico and Brazil
  + Appoint one Account Manager per region (Mexico and Brazil)
  + Take responsibility for the management and delivery of the ongoing activities
  + Making sure that plans and approval processes are scheduled with risk and viability assessments taken into account
  + Ensure that DIT Communications Managers keep the account manager up to date with any potential changes to the project
  + Regular meetings at the British Embassy in Mexico City and ‘week by week’ status report

1. **Data base building**

* The selected agency will need to build and update a media data base according to the priority markets and sectors for DIT Latac
* Data bases should include traditional and online media, as well as key opinion leaders and relevant blogs
* Media outlets should be divided into Tier 1, Tier 2 and Tier 3 basis highlighting specialized media
* Data bases will be shared with DIT Communications Managers as a deliverable at the end of the project

1. **Press release distribution**

* The production of Press releases will be in charge of the DIT Communications Managers and sent to the PR Account Manager for distribution.
* Occasionally and not in a regular basis, the agency will be asked to produce Press releases in which case DIT will be in charge of collating and sending the information needed.
* Global Press Release Distribution: When press releases have been sent by HQ, this will be sent for translation and distribution in their markets.
* Press releases will be tracked using the press release tracker with releases colour coded by importance.

1. **Press invitations**

* For Embassy events where DIT’s presence needs to be highlighted, the agency will be asked to send media invitations and secure presence of a number of journalists depending on the relevance of the event.

1. **Q&A Interviews**

* The agency will be asked to look for interview opportunities in media for DIT spokespersons.
* Before any interviews are scheduled, the opportunity will be shared with relevant sector team before committing to the interview.

1. **Reporting and monitoring**

* The agency will be asked to include a monitoring tool as part of the day to day activities.
* Daily News report will be shared daily with Communications Manager in English.
* Activity and publication reports will be shared in the time frame specified in ‘DELIVERABLES’ section.
* The monthly report should include both quantitative and qualitative aspects.

1. **Events and happenings**

* Occasionally the agency will be asked to provide support in the production or implementation of an Embassy event.
* The agency should be capable of managing suppliers and suggest contacts.

1. **Senior management positioning**

* One of the priority tasks for the PR Agency will be to seek for opportunities of positioning and exposure of DIT’s senior management in sector events, forums, etc.
* All opportunities should be included in an Activity calendar to give the Comms team opportunity to plan ahead.

1. **British brands collaboration**

* The agency will be asked to liaise with British brands and identify opportunities of collaboration (GREAT brand, co-branding, ministerial involvement).
* The Communications Manager should assess the opportunity to secure Embassy’s participation.

1. **Government affairs**

* The selected agency should have capabilities to identify government (particularly trade & investment) related and be able to secure DIT senior management participation.

**EVALUATION**

The allocation of DIT LATAC Marketing and Communications HUB budget is based on, and thoroughly measured by, strict key performance indicators (KPIs). The elected company will need to produce an evaluation report including the following:

1. **Traditional media report** covering 1) advocacy (focused on key stakeholders and influencers quotes and mentions); and 2) quality and quantity analysis of media hits (including favourability, tonality, key messages delivered, tier/quality of media channels, reach and advertising value equivalency).
2. **Activity report** covering 1) Activities quality analysis of social media engagement (including sentiment, reach, impressions, and influencers’ engagement); and 2) quantity analysis (hashtag tracking, new followers and likes/views).

## KEY DATES

|  |  |
| --- | --- |
| Elected company is announced and initial meetings takes place | **1 November 2018** |
| Project launch | **Mid November 2018** |
| Event calendar 2019 with key dates clearly marked | **5 Dec 2018** |
| Monthly reports | **5 Dec 2018** |
|  | **5 December 2018** |
| **7 January 2019** |
| **5 February 2019** |
| **5 March 2019** |
| **5 April 2019** |
| Trimester report | **7 January 2018** |
| Semester report | **5 April 2019** |
| Final report | **5 May 2019** |
| Media data bases | **5 May 2019** |
| \*Subject to other agreements between the British Embassy and the Service Supplier, dates for delivering outputs might change. | |

## REPORTING STRUCTURE, LOGISTICS AND OTHER ARRANGEMENTS

* The Service Supplier will deliver the project with the standards outlined by the FCO in this document.
* The Service Supplier is permitted to subcontract elements of certain services with the consent of the FCO, details of any subcontracted services must be provided to the FCO in advance of the Service Supplier entering into any agreement. The winning agency will manage any third-party suppliers directly, at no point during the project, will the FCO manage tasks or assume responsibility for delivery of subcontracted services.
* No advance payment will be made earlier than the 1 December 2018. Total advance payments will not exceed 30% of the total contract value.
* Attendance will be required at regular meetings with the British Embassy in Mexico team to be held at Embassy premises. Both parties will agree the regularity of these meetings.

**SKILLS AND COMPETENCES**

The agency expert(s) will have to demonstrate knowledge or capability in:

* 1. Project management skills (timeline development).
  2. Organisation and management of large-scale projects.
  3. Supplier management (many third parties involved).
  4. Native language skills (Portuguese, Spanish and English)
  5. Evaluation skills.

**TENDER’S PACKAGE**

* **Project management plan**

The agency will be asked to present a project management plan where key dates are clearly marked, timetables are filled and all activities are taken into account.

* **Methodology**

The agency should present a document in which the methodology for managing the account is presented. This should include human and technical resources, delivery and document formatting.

* **Expertise**

Agency should present their credentials in a short presentation in order to prove expertise in similar projects or justify capabilities.

* **Project team**

The agency will be asked to invite at least two members of the team that will manage the project on a day-to-day basis.

An evaluation panel will evaluate the proposals and shortlist bidders according to the criteria below, the panel will then invite the top three bidders to deliver their presentation to the evaluation panel at British Embassy in Mexico. The presentation will last no longer than 20 minutes, it will take place at Embassy facilities and will be in English.

## BUDGET

DIT Latac Marketing and Communications HUB has allocated £24,900 for the Public Relations Agency to provide their services. This budget must cover the deliverables mentioned in this document, which will need to be presented in the specified timeframe.

* The Service Supplier will propose the overall budget for this work, which must be expressed in GBP and inclusive of all applicable taxes (including VAT), overheads and any logistical costs including, but not limited to, travel, catering, venue, translation, etc. The Supplier is expected to show VfM and not reach the budget ceiling if costs can be lower.
* Occasionally the British Embassy in Mexico and Brazil could provide resources to complement the agencies activities. This will be confirmed in-project.