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**EU Grant to Improve Access to Vocational Education, Skills Training and Remedial Learning in the Traditional Banana Growing Communities in Jamaica
Financing Agreement No. B7- 8710/856/25**

**HEART Trust/NTA
EU Banana Sector Retraining Project**

**TERMS OF REFERENCE – Revision 1 (December 1, 2008)
Marketing Services Provision**

Background Information:

The HEART Trust-National Training Agency has been approved under the EU Grants to Improve Access to Vocational Education, Skills Training and Remedial Learning in the Traditional Banana Growing Communities in Jamaica. The 15-month project with an EU contribution of 300,000 euros, proposes an education and training project aimed at banana farmers and farm and port workers in the traditional banana growing areas of Jamaica, the parishes of St. Thomas, Portland, St. Mary, St. Catherine, Clarendon and St. James. In phase one of the project, the Agency will work with the groups to understand their education and training needs through a comprehensive set of training needs studies, career development workshops, remedial education programmes using new information and communications technologies, prevocational training and vocational skills training.

The overall objective of the project is to provide greater access to alternative training and certification opportunities for ex-banana farmers, who exited the industry within this last decade, farm and port workers who were laid off, and other persons in the communities who have been affected by the decline in the banana industry, to enable their transitioning into new, diverse and sustainable income generating activities. This will improve the income and standard of living of project participants.

The specific objective of the project is to learn a sufficient amount from the project experience to inform a more comprehensive remedial and technical and vocational skills training programme design, through conducting research and pilot projects, for an intended Phase 2 of the project.



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Outputs-Results

The project will target a total of 620 project participants who will participate in pilot programmes specifically designed for the needs of the target group members and their communities. These pilot programmes will be conducted in the six target parishes. Pilot programmes offered will include:

1. **Pre-vocational training programmes** that focus on employability skills of the participants consisting of “Unit Competencies” such as
 - Communicate Effectively in the Workplace
 - Work in a Team
 - Work with Colleagues and Customers
 - Carry Out Data Entry and Retrieval Procedures
 - Communicate on the Telephone
 - Describe and Analyse Data using Mathematical Principles
 - Craft a Personal Entrepreneurial Strategy
2. **Vocational training programmes**—HEART Trust-NTA has a wide array of existing programmes already in place, and has no limitation on age of participants. Thus, some members of the target group may be admitted to these existing training programmes that match the interest and aptitude of the applicant. Generally, participants need to pass a test pegged at a grade nine level of academic achievement focusing on general knowledge, English language and practical mathematics. HEART Trust-NTA has 61 locations in the six target parishes already offering skills training in 20 skill areas covering 12 economic sectors. Of the 61 locations, 9 are HEART-operated institutions and 52 are operated in conjunction with partner organisations
3. **More specialised vocational skills training programmes** will also be piloted, based on small projects designed in conjunction with specific communities and existing and possibly new community based training providers. These will be developed following our existing project development procedures
4. **ICT enabled remedial education programmes** that build on recent experiences gained with the HeadSpace Software that was piloted last year at Rockfort Vocational Training Centre in Kingston. The 3-part training programme comprising WordCraft 1 – Reading; WordCraft 2 – Writing; MathCraft – Grades 1-9; will be conducted over a six-month period. Learners will advance through the programme at their own pace supported by the on-site facilitators and the consultants’ virtual support network –via e-mail, Skype and the Learning Management System.

On conclusion of the 6-month training programme, those learners who have successfully completed the HEART Grade 9 test, will be invited to apply for any of the HEART funded programmes or re-integrate into academic programmes at the secondary level. Those who are not successful will have the opportunity to re-do the Literacy programme as required through their respective centres as they will have on-going access to the software and the on-site facilitators trained under the project. Based on the success of the project, the idea is to extend the Literacy programme to other centres, including those outside of the pilot area, either via the web-based Learning Management System, or, if they do not have access to high-speed internet, via CD-ROM.

5. **A Training Needs Analysis** will be conducted to provide additional knowledge about the target population to sharpen the focus and improve services for an intended Phase 2 of the project. A consultant will be hired to conduct the analysis under the direction of the Director, Research & Evaluation, HEART Trust-NTA, who will develop the Terms of Reference, in consultation with the EC project office, and conduct a competitive procurement of the consulting services. The aim of the analysis is to gather extensive information on the target group including:
- The geographic, gender and age distribution
 - The labour market status, particularly focusing on reasons for both unemployment and withdrawal from the labour market
 - The educational background of members of the group
 - The work experience history, patterns, sequences, skill sets and their transferability
 - The occupational interests and economic aspirations of members
 - The availability of members for participation in education and training and work experience activities and constraints in accessing these activities
 - An analysis of special needs and consideration as to how to sub-divide the groups according to needs
6. **Career Development Workshops** will be conducted in each of the six parishes for 50 persons per parish and a total of 300 individuals. Participants will be exposed to career counselling workshops aimed at their specific needs and priorities. There will be a need to expose participants to the wide range of careers and corresponding education and training opportunities available through the HEART Trust-NTA. The large expansion of tourism presently occurring in Jamaica provides fertile ground for change in occupation by participants, who can benefit from new opportunities in hotel housekeeping, grounds and landscape, food and beverage services, and hotel maintenance. This will be particularly relevant for participants from Portland, St. Mary and St. James.
- The Career Development programme will include exposure to career information about the variety of jobs and qualifications in the economy, assessment of aptitude, occupational interest and academic achievement, individual and group counselling about vocational choice, remedial, pre-vocational, or vocational skills training selection, resume development, and interviewing skills. These workshops will be located at various HEART venues including HEART regional and parish offices.
7. **A Programme Evaluation** will be conducted between months five and fourteen of the project to assess the strengths and weaknesses of the project and to gather lessons learnt so as to inform an intended Phase 2 of the project. Each result area and the activities associated with it will be evaluated in terms of relevance, effectiveness and efficiency. A qualified Programme Evaluation Consultant will be selected and this Terms of Reference document has been prepared to initiate this process. HEART Trust-NTA has Programme Evaluation expertise on staff who will supervise the work of the consultant selected.



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Scope of Work:

The Marketing Services Company will be contracted to provide a marketing strategy and plan for the successful delivery of the project to the end beneficiaries in the 6 target parishes and meeting the funding body's requirements. The company will also provide specific deliverables during the course of the project at pre-determined points in time. The deliverables are primarily the following:

1. Marketing Strategy and Project Marketing Plan
2. PR / Publicity support
3. Colour Brochures / flyers (3,000 total)
4. Radio advertisement jingles 30 seconds
5. Occasional advertisement use on selected radio stations
6. 2 pop-ups/pull-ups with featured banana workers with before training and after training images
7. 15 minutes Documentary on DVD
8. Banners for media PR events
9. Brief Evaluation of project marketing activities

Each item will be required at a particular stage of the project and so will have specific deadlines for delivery during the period January 2009 to December 2009.

The work required is a complete service provision for design, development and creation of the marketing product or service. Close collaboration with the client within HEART-NTA will be necessary in several instances to ensure sign-off during developmental stages prior to completion of finished product.

Objectives:

The Marketing Services Company will accomplish the following:

1. Ensure the project is promoted and marketed in a cost-effective and timely manner to give it optimal exposure and favourable coverage to the 3 key audience groups – end beneficiaries in the 6 targeted parish banana communities, Public and Private sector organisations involved in the banana sector and the European funding agency
2. Provide timely and responsive marketing support in a variety of aspects and formats to promote the project in a positive manner to diverse and targeted audiences
3. Supply creative input for design and development of printed and electronic media products
4. Provide advisory support and marketing expertise during the lifecycle of the project

Activities

The Marketing Services Company will perform the following activities in delivering this programme of evaluation during the period January 2009 to December 2009:

Marketing Strategy and Plan

Develop, document and execute a successful marketing strategy and plan for the lifecycle of the project.

PR / Publicity Support

Develop and implement a cost-effective PR / Publicity activity for the project

Printed Brochures/Flyers

Design, develop and print colour brochures to disseminate to target beneficiary communities throughout the lifecycle of the project

Include all visual, photographic, branding and content message development.

Total number of flyers expected is a minimum of 3,000 copies



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Radio Advert Jingle

Design, produce, record and place a 30 second advert for airing to the target rural banana communities over selected radio media.

Include message develop, music jingle, voice over and all aspects for a complete deliverable

Advert Placements in media

Formulate a cost-effective advertising strategy for the project to reach the target **audience in the 6 parishes of St Thomas, Portland, St Mary, St James, Clarendon and St Catherine with radio ads.** Secure placement of ads in chosen targeted stations and evaluate its effectiveness. (Please note that although the estimated figure for the cost of the radio campaign is to be stated it is **not to be included** as part of the quote of this bid)

DVD Video

Design, develop, record, edit and produce a 15 minute documentary about the project over its lifecycle. Extracts to be used for possible cable channel adverts (2 – 3 minute fillers) – see above.

Event Marketing Collateral

Design, develop and produce **2 pop-up expo style** stand props for use at public events associated with the project across the 6 parishes.

Also produce **2 flag style banners** for said events.

These items should be available in time for the mid-January Career Workshops and appeal to live audiences as well as for TV media coverage. Includes photos, visuals, branding, strap-line development

Deliverables:

1. Marketing Strategy and Plan for the project
2. PR & Publicity Support plan
3. 3,000 Colour A5 Brochures and
4. A 30 sec Radio Advert with message and jingle to engage with target project beneficiaries in the rural banana communities
5. A 15 minute DVD documentary and raw footage for use in media campaign
6. Pop-up and fold-away expo-style banners (2) and flag style banners (2) for use at public events and workshops

Time Period and Payment Schedule:

The Marketing Services provision assignment should commence by January 5th 2009 and be completed no later than December 12th 2009.

The total quote provided in response to this tender should be broken down into the following components:

- a) Cost of associated Marketing Advisory Services for the complete package solution. This should be the total cost on the project for designing, implementing and evaluating the marketing strategy, marketing plan, PR & publicity services (**not to exceed 60 consulting man-days**)
- b) Cost of radio advert (30 sec) – **No quote for radio campaign** to be included at this stage
- c) Cost of designing, producing and printing 3,000 colour brochures
- d) Cost of 2 pop-up expo-style colour exhibit stand props (minimum size 4.5 feet by 3 feet)
- e) Cost of 2 flag banners for the project promotion at events
- f) Cost of 15 minute DVD documentary

A **single quote figure** for the total bid shall be provided for comparative purposes with other tenders.



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An initial mobilisation payment of 15% of total quote will be made after signing of the contract
Thereafter 3 payments of 20% of the total quote will be made quarterly in arrears.

A final payment of 25% of the total quote will be withheld and made as payment upon completion of all deliverables and signoff by the Project Committee.

Counterpart and Reporting Structures

The overall project will be managed by the HEART Trust-NTA through its Planning & Project Development Division under the auspices of Elizabeth Terry, Director.

The consultant will report to Ms Terry but have day to day contact with the Project Administrator with regards to operational and logistical matters.

The Projects and Partnerships Unit will provide the required project secretariat services.

Counterpart Responsibilities:

1. Assist with input into marketing strategy and objectives
2. Provide logistical support to public events as required
3. Provide timely feedback to design and development of marketing collateral items
4. Confirm transmission budgets for negotiation with third party media companies such as radio stations and cable channels

Cost of Tendering

The tenders shall bear all costs associated with the preparation and submission of their tenders and that the procuring entity will in no case be responsible or liable for those costs, regardless of the outcome of the tendering process.

Language of Tendering

Tenders documents should be prepared and submitted in the English Language.

Tender Prices

A detailed budget outlining the labour price, travelling and other resource costs must be clearly done and submitted along with the pre-qualification documents.

The proposer should submit labour rates on an hourly and daily basis for any effort billable under the project including professional effort of a lead or associate consultant, junior professional effort that may be used to gather, organize and present secondary data, and any clerical assistance that may be required.

The proposer should indicate the estimated cost for travelling from one location to another clearly identifying the base from which they will operate and the purpose for which they need to travel.

Other resource costs (e.g., material, overheads, etc.) must be clearly described and tied to the various activities planned for the project.



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Clarification of Tender Documents

Methods by which tenders may seek clarification on the tender document should be done in writing on their official letterhead and e-mailed, hand delivered, mailed or faxed. Telephone queries are not acceptable.

All clarification queries are to be addressed to Mrs. Elizabeth Terry, Director of Projects and Partnerships at the HEART Trust/NTA, 6b Oxford Road, Kingston 5 or e-mailed to elizabeth.terry@heart-nta.org. The Fax telephone number is 960-9486.

Amendment of Tender Documents

If at any time prior to the deadline for submission of tenders the procuring entity amends the tender document(s), the details of the amendment will be issued as an addendum and where it becomes necessary, the procuring entity may extend the deadline for submission of tenders. This will be communicated via email, NCC website or the printed media depending on the media originally used for advertising the tender.

Late Tender

Any tender submitted to the procuring entity after the prescribed deadline for the submission of tenders will not be accepted.

Modification and Withdrawal of Tenders

Bidders may modify or withdraw their tenders after tender submission provided that written notice of the modification or withdrawal is received by the procuring entity prior to the prescribed deadline for submission of tenders.

The requirements for tender submission remain the same for the submission of modifications or withdrawals.

Proposals should be sent to:

Elizabeth Terry
Director, Projects and Partnerships
Planning & Project Development Division
HEART Trust/NTA
6B Oxford Road
Kingston 5



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Procurement Process

Proposals (both hardcopy and softcopy versions) are due by 12:00 noon on **Wednesday December 17, 2008**. No submissions will be accepted past this deadline.

Proposals will be delivered to the HEART Planning Division offices on the second floor and placed in the box at the reception area marked Proposals for TNA of Banana Sector Retraining Programme. A receipt will be provided to those submitting proposals.

Electronic versions of the bid quote document must also be emailed to Elizabeth.Terry@heart-nta.org.

Proposals will be opened at 9:00am on Thursday, December 18 at the offices of the HEART Trust/NTA 6B Oxford Road, and those submitting proposals are invited to witness the opening of the proposals. All proposals submitted by incorporated firms must contain a valid Tax Compliance Certificate and all those submitting proposals must be on the National Contracts Commission Register of Public Sector Contractors.

HEART's Procurement Committee oversees the competitive bidding process. This committee, including the Director and Senior Director of the Division will evaluate the proposals based on:

1. The technical capability and experience of the individual(s) or firms demonstrated by evidence of the quality of the proposal submitted, qualifications and experience of similar work undertaken and the ability to produce on time as evidenced by references to other contracts and projects undertaken, broken down as follows:
 - a. Quality of proposal/approach to consultancy – 25%
 - b. Qualifications of supplier - 20%
 - c. Completion of similar projects - 25%
2. On time performance-will be checked with referees, but not scored; those with poor references will be rejected
3. Price. 30%

Notification of Award

Within **10 working days of the closing date**, the procurement entity will notify the successful bidder in writing and promptly notify unsuccessful bidder of their unsuccessful bid for the contract.

Signing of Contract

Following the completion of the acceptance letter, the procuring entity will arrange with the successful bidder for the signing of a contract.