



SWISS CAPACITY BUILDING FACILITY

Innovating Financial Inclusion

Request for
Proposal
(RFP)

For

SCBF Branding and Website Refresh

Issue date: 16.08.2022

Responses due: 30.09.2022

1. Introduction

1.1. Background to SCBF

The Swiss Capacity Building Facility (SCBF) is a Zurich-based non-profit public-private development platform established in April 2011 to assist financial sector partners (FSP) such as insurance companies, fintechs/insurtechs, microfinance banks, and savings and commercial banks, in significantly scaling their outreach to poor people in developing countries. S

SCBF provides standalone technical assistance (TA) grants to TA providers to work with FSP to develop, pilot, replicate and scale innovative, affordable, client-centric financial products, channels and services (FPCSs). The end goal is increasing access to and usage of these FPCSs by SCBF's target end-clients. SCBF has three co-funding windows which are:

- The **“product upscaling and innovation window” (PUIW)** which co-funds TA to develop, pilot, assess effectiveness, replicate and scale innovative and client-centric FPCSs to reach SCBF's end clients.
- the **“feasibility study window” (FSW)** which co-funds in exceptional cases the preparation of feasibility studies and dry runs for introducing insurance and other new FPCSs by supporting existing financial institutions, FinTechs and InsurTech. The FSW helps in preparing the groundwork for developing subsequent proposals for the Product Upscaling and Innovation Window (PUIW).
- The **“financial education window” (FEW)** co-funds financial education for SCBF's end clients and TA for MSMEs (particularly female-led businesses) and campaigns that are essential before or at the same time FPCSs can be introduced by a PFI. The FEW supports PUIW grant projects. The FEW grants must be linked to a financial product, channel or services and in principle will not be approved as a standalone campaign.

The SCBF's goal at an impact level is improved economic well-being of low-income and vulnerable households, smallholder farmers and MSMEs. This improved well-being is generated by three principle impact objectives:

- **Increased resilience to protect basic standards of living** – by using savings and insurance products, low-income and vulnerable households, smallholder farmers and MSMEs build resilience to better respond to the negative effects of adverse weather events, catastrophes, death/illness of the breadwinner or of conflict.
- **Increased employment, income and asset-building** – by using adequate loan, leasing and insurance products, low-income and vulnerable households, smallholder farmers and MSMEs invest in their productive activities, increase income through increased access to markets, create employment opportunities and build assets.
- **Increased access to essential services** – by using adequate payment services and channels, low-income and vulnerable households, smallholder farmers and MSMEs have increased access to electricity, clean water, sanitation, education and health care on affordable and predictable terms.

The SCBF is a unique association that brings together various actors in its [membership](#) and partners involved in the projects it funds in the financial inclusion space

1.2. Background to the Request for Proposal (RfP)

Aligned with SCBF’s strategic pivot and vision for 2030, SCBF is looking for creative agencies or consultants to support the website and branding refresh. This will be a concept to completion project, with the below key deliverables:

- i. Refreshed visual identity reflecting the new strategic direction and vision,
- ii. Complete branding toolkit and style guides, and
- iii. Redesigned SCBF website (currently website can be accessed here: www.scbf.ch).

A full statement of requirement is found in part 3 of this RFP.

2. Instructions and Proposers

The following dates have been established as milestones for the RFP. SCBF reserves the right to modify or change this timeline at its discretion.

RFP Milestones	Date
RFP Issue Date	16.08.2022
Deadline for acknowledgement of intention to participate and submit clarification questions	15.09.2022
RFP closing date and time	midnight CET 30.09.2022
Estimated award date (subject to contract)	01.10.2022
Project Milestones	Date
Assignment starts	1.11.2022 (or by agreement)
Draft report completed and submitted to SCBF for review	31.1.2023
Final deliverables completed and submitted	31.03.2023

SCBF Contact

The following individual is the contact for this RFP:	
Name	Rudhayaini Mukane
Title/Position	Operations Officer
Email	Rudhayaini.mukane@scbf.ch

2.1. Intent to Participate:

Please advise the nominated SCBF contact of your receipt of the RFP and your intent to submit or not a proposal by email no later than the deadline set out in section 2.

2.2. Questions During the RFP Process

Proposers are to direct all questions in relation to this RFP to the nominated SCBF contact no later than the deadline set out in section 2. No other SCBF personnel or third party are to be contacted in relation to this RFP unless specifically instructed to do so by the nominated SCBF contact. SCBF reserves the right to disqualify and reject proposers that do not comply with this. All questions should be submitted in writing by email to the nominated SCBF contact.

2.3. Submission of Proposals

Proposers are required to submit a soft copy of their proposal which should be emailed to the nominated SCBF contact. The subject heading of the email should clearly state your company

name. Proposers may submit multiple emails (suitable annotated e.g., email 1 of 3) if attached files are deemed too large to suit a single email.

Proposals must be prepared in English and in the format requested.

2.4. Proposers to Inform Themselves

SCBF has taken all responsible care to ensure the RFP is accurate, however, SCBF gives no representation or warranty as to the accuracy or sufficiency of the contained information and all proposers will receive the same information. Proposers are required to inform themselves fully of all conditions, risks and other circumstances relating to the proposed contract prior to submitting a proposal. Proposed prices shall be deemed to cover the cost of complying with all the conditions of the RFP and of all things necessary for the due and proper performance and completion of the requirements.

2.5. Cost of Preparing Proposals

The proposer is solely responsible for all costs and expenses incurred in the preparation and presentation of its proposal, including without limitation market research and attendance at meetings.

2.6. Proposal Requirements

Proposals must be submitted with the following information included in response to the requirements documented in part 3.

Proposers are free to use a format they are comfortable with, so long as the proposal is no longer than 10 pages and includes the following:

- i. **Contact Details:** Proposers must provide full contact details including physical address, contact telephone number and email address.
- ii. **Profile:** provide a brief description of your firm/team, your process approach and project management approach, past clients, and any other information you deem necessary for us to get to know you.
- iii. **Proposed approach:** a work-plan, including the specific activities, deliverables and timelines, describing how you will implement the design and development of the process for this project.
- iv. **Portfolio:** showcasing your current work with an emphasis on branding/rebranding and web design. Samples from work undertaken with other non-profits or development sector entities are welcome.
- v. **Project team qualifications:** Names and CVs of principal consultants with complementary expertise to address all items identified in the RFP and a description of their role within the project team. Qualifications of staff should include relevant technical capabilities, specific previous project experience, reference to their professional networks and experience.
- vi. **Estimated cost:** A total cost, in Swiss Francs, must be provided for the scope of work detailed. A breakdown of the estimated costs by component and by consultant should be presented (i.e., tabular format) and should include Direct Costs (number of days per staff,

seniority, area of expertise and their associated unit costs) and, if relevant, Indirect Labour Costs (i.e., travel, sub-contractors, etc.) and the role of each member of the consulting team. Any assumptions related to the estimated costs must be clearly stated. If the proposers foresee any monthly hosting costs (e.g. for the website), these should be highlighted.

- vii. **Fee structure:** Should be fixed fee and milestone based (i.e., paid upon approved deliverables). A proportion of payment on appointment is acceptable but only in circumstances where significant costs associated with initial mobilisation are likely to be required.
- viii. **References and samples:** Proposers should provide three references of clients for whom they have delivered similar projects or work, as well as share samples from previous website design/branding work.
- ix. **Statement of Capacity:** Proposers must state all necessary resources to effectively complete the scope of works which shall be made available during this project.
- x. **Conflicts of Interest:** Proposers must declare any conflicts of interest in carrying out the services documented within this RFP. Where no conflicts are identified a statement to this effect must also be provided.
- xi. **Contract:** Proposers must provide a copy of their standard terms which would apply should they be awarded the contract.

Our preferred requirements for the design team/consultant or creative agency are as follows:

- Extensive experience in web and graphic design, especially using human-centred design approaches would be beneficial.
- Experience in providing branding / communications services to non-profits or organisations working in the development sector (experience with entities engaged in financial inclusion would be desirable).
- Expertise in creating branding, websites and associated collateral, emphasizing storytelling via graphic design (note that the topic SCBF works on – financial inclusion – is technical and as such, it is important that our content is able to communicate our story and impact effectively and consistently to audiences not well versed in the area).
- Knowledge of and comfort using various illustration and graphic- and web-design platforms, such as Adobe CC, WordPress etc. (we assume this is a given with proposers responding to this RfP but specifying nonetheless to avoid any doubts).

2.7. Evaluation Criteria

Proposers will be evaluated based on examples of similar work, proposed approach and process, design ability, experience and technical expertise, references and cost-effectiveness. SCBF may request additional information to assist further evaluation of proposals.

2.8. Bidders

SCBF will accept proposal from both companies and individual consultants which form a team to deliver this assignment meeting the requirements of the RFP. Pro bono proposals are very much welcome particularly as SCBF is a not-for-profit organisation and would not require a financial proposal in this case.

For teams of individual consultants and for companies a Team Leader must be nominated who has the primary responsibility for the successful delivery of the assignment and for SCBF to make the payments to.

This RFP has been circulated to a few companies and individuals (the Bidders) and posted on social media.

2.9. Joint Proposals

Bidders might like to partner with each other (or with others) to leverage various experience and expertise.

Where joint proposals are submitted, one service provider should be the designated lead provider, reporting to SCBF. The second provider should be paid by and report to the lead provider, and the proposal must clearly articulate how the two (or more) organisations will work together.

2.10. Budget

The described level of effort (LoE) for this RFP should give an indication of the budget available. While this LoE is indicative only and SCBF will consider alternative proposals, we aim to select a provider who can demonstrate an efficient and economical allocation of resources while ensuring high quality of delivery. Bidders should propose a payment schedule that incentivizes timely and high-quality completion of key deliverables.

3. Project Requirements

3.1. Background

2022 is a milestone year for SCBF, as after 10 years of successfully funding over 160 technical assistance projects for financial inclusion, and reaching over 2.6 million low-income clients, SCBF is undergoing a strategic pivot and expanding its focus areas, such as exploring impact-linked finance and strengthening knowledge curation and dissemination efforts. In line with these changes, as well as to strengthen SCBF's online presence, we are looking for a creative agency to partner with to define SCBF's visual identity and redesign the website.

3.2. Objectives for the branding and website re-design project

In line with some of the communications issues we have identified, SCBF seeks to accomplish the below goals through the branding and website redesign project:

- The branding should create a clear and coherent image of what SCBF does, its vision, mission and impact. As SCBF is undergoing a strategic pivot, it is vital that our branding reflects this new vision and broadened remit.
- The branding should resonate in the minds of SCBF's key stakeholders, which includes donors, members, grant applicants and recipients, and strategic partners (such as research groups, impact investors, NGOs and development agencies). It should elevate SCBF's positioning as a thought leader in public-private partnership approaches for inclusive finance through a branding that resonates with key audience groups.
- The branding should distinguish SCBF and increase recognition in a landscape which is continuously evolving, with newly emerging approaches and investment models for inclusive finance.

- The branding should compel our closest internal and external stakeholders, who directly support and advance our mission, to be proud and ardent brand advocates.
- The website refresh should result in a platform which is visually appealing, functional, easy to navigate and responsive to the devices used to access it. The design and layout, need to be consistent and in line with best practices in web design. The key content/messaging needs to be search engine optimised. The current website is built on WordPress, but we are open to using another technology and content management system that might better suit our needs.
- The new website should complement SCBF's efforts to gain visibility, develop new partnerships and create a channel where readers can easily access the knowledge emerging from SCBF projects.
- The new website should improve the ease and efficiency with which staff can publish and edit content (we expect the markup and style to be as simple as possible to allow efficiently updating it over time).

Our main target audiences are:

- SCBF staff
- Current and prospective SCBF members
- Donors (government development agencies/funders in Europe, private sector foundations, philanthropists and impact investors)
- Project teams that receive grant-funding as well as financial sector partners, including insurtechs, impact investors, micro-finance institutions, NGOs etc.
- Academic and research partners
- Affiliated networks (focusing on financial inclusion and impact investing)
- Strategic partners (e.g. fintech/insurtechs accelerators)

In addition to those mentioned above, SCBF's website is also a value source of information for prospective grant applicants, think-thanks working in the inclusive finance space, and students.

3.3. Scope of the project

A combination of methods is expected to be used depending on the knowledge of the consultants. These include (and are not limited to):

- **Discovery phase:** consultations with the team and if needed key external stakeholders, to understand challenges and glean insights on SCBF's vision and mission to gauge key aspects (tone, personality, imagery, theme etc.) that could become a part of the new brand and visual identity. This phase should also cover desk research to understand how counterparts in the inclusive finance sector brand themselves and auditing of existing branding and communication collateral.
- **Design phase:** based on findings from the discovery phase, the creative firm/team/consultant will develop the required branding collateral and website, using an iterative approach to ensure the SCBF team has an opportunity to feed in at regular intervals. This will likely also include presentations on the proposed branding/website to senior management and SCBF Board to obtain their approval.
- **Deployment phase:** this will mainly include handover of all deliverables (including relevant raw files), trainings on the branding toolkit and backend management of the website, as well as activation of the new website, once all the necessary approvals are received.

3.4. Indicative Final Deliverables

Branding toolkit, including:

- A new logo in various format for multiple applications (e.g. use on web, reporting templates and key documents; sharing with partners; use on printed media etc.)
- Fonts
- Colour palette
- New or modified tagline (tbd)
- Brand identity template files for: business cards, letterhead, slide decks, and templates for knowledge products (project factsheets, final reports, publications and studies)
- Integrated imagery and complementary design elements, including recommendations on illustration and photography style
- Standards and guidelines to drive brand consistency across the organisation and our partner network (mainly members, grantees and donors)

Website content, design and launch, including:

- Admin-level access to website/content management platform, including relevant trainings and manuals
- Access to any themes, illustrations or paid imagery that might be used on the website
- Content and style guidelines
- Website maintenance and management plan

Thank you for your potential interest in working with SCBF on this important project.