

TERMS OF REFERENCE: FinEquity Communications Consultant



Project Title: CGAP Women's Financial Inclusion Community of Practice (FinEquity)
Communications Consultant

From: TBC

To: June 30, 2023

Task Manager: CGAP External Relations Officer

How to Apply

Please submit cover letter and CV to the Portal by September 18, 2022.

<https://spa.worldbank.org/sites/stco/Pages/en/OpportunityProfile.aspx?oppld=2628&Source=/sites/stco/pages/en/FindOpportunities.aspx>

Scope of Work

The FinEquity Communications Consultant will work closely with the FinEquity facilitator, technical and regional facilitators as well as with the FinDev and CGAP Communication's team. Effectively the consultant will be responsible for all communications related activities for **FinEquity Global** and **FinEquityAfrica** (communications for FinEquityALC is largely done by the regional facilitator for FinEquityALC). This includes:

Online Web and Production Editor

- **Strategies:**
 - Responsible for planning, implementing and monitoring appropriate digital strategies to promote effective online communication and engagement, including developing and maintaining relevant digital editorial calendars.
 - Implements online campaigns to target key audiences and measures success in achieving them.
- **Online Management:**
 - Applies editorial processes and approval workflows to write, edit, review, and publish digital content.
 - When appropriate, helps develop new online channels and manage revamps; reviews products and shepherds them through governance processes.
 - Reviews and monitors online properties for quality and timeliness, as well as for compliance with FinEquity, CGAP and WBG standards (editorial, technical, security).
 - Helps identify opportunities to use existing and emerging online tools.
 - Coordinates and delivers routine online communications activities and events.

- Supports FinEquity’s knowledge management function with curated resources hosted on the FinDev Gateway platform
- Complies with FinDev Gateway’s editorial responsibilities
- **Content Creation:**
 - Supports the FinEquity facilitator, thematic and regional leads to prepare, package and adapt material into appropriate and effective digital content.
 - May help conceptualize and write or commission specific content, including multimedia, in coordination with other communications staff or FinEquity members, as needed.
 - Undertakes or coordinates developmental editing and copyediting for knowledge products and blogs
- **Social Media:**
 - Plans, implements and integrates relevant social media outreach and audience engagement using blogs and other social media platforms.
 - Advises or leads others in their use to ensure effectiveness; supports FinEquity facilitator to identify and support content contributors.
 - Carries out day-to-day messaging and promotion of content on FinEquity’s social media channels, works to ensure consistent and appropriate voice depending on the audience/channel.
- **Publishing:**
 - Regularly publishes content to appropriate content management systems in compliance with FinEquity, CGAP and FinDev Gateway standards and guidelines – and works in close collaboration with FinDev Gateway editors when relevant.
- **Metrics:**
 - Helps establish key performance indicators and reviews web metrics reports; helps share results and recommendations with FinEquity and CGAP communications teams.
 - Acts on audience feedback to improve online content.
- **Regional Support – FinEquity Africa**
 - Liaise with FinEquity Africa facilitator and regional partners to identify and publish relevant content for the FinEquity Africa page on FinEquity’s global site.
 - Regularly share updates, events, resources and news relevant to the FinEquity Africa community on Twitter and LinkedIn or Facebook channels
 - Launch LinkedIn or Facebook group for FinEquity Africa
 - Co-create engagement plans for social media networking groups for FinEquity Africa and FinEquity Global

Communications Planning, Implementation, and Promotion

- Implements communication activities in FinEquity’s yearly workplan.
- Supports all major documents, including briefs, case studies, and other technical documents, to ensure they are well written and clearly communicating key messages. Ensures all written products follow CGAP’s editorial guidelines.
- Implements communication activities in FinEquity’s yearly workplan.
- Works closely with CGAP Communications Team to help achieve an integrated gender strategy that embeds FinEquity insights into CGAP’s overall work.
- Supports all major documents, including briefs, case studies, and other technical documents, to ensure they are well written and clearly communicate key messages.
- Ensures all written products follow CGAP’s editorial guidelines.

- Coordinate media outreach and draft media material, web and print news stories, and external articles on COP activities, events, seminars, and updates if and when necessary, in coordination with the CGAP communications team.

Design

- Designs and develops content for flyers, posters, event displays, presentations, and other visual assets as needed.
- Designs digital postcards and other promotional materials.
- Oversees the design and layout of the FinEquity newsletters and other communications materials.
- Maintains a set of PowerPoint templates to support thematic and regional leads to use a consistent style and branding.

Deliverables

The following are expected deliverables based on the scope of work defined above.

- 1. Develop and implement FinEquity’s Communications Plan**, outlining content planned for the year and techniques for sharing and promoting knowledge generated. This will include:
 - a. Work with the FinEquity facilitator, thematic and regional leads, and CGAP communications specialists to develop an influence strategy and communications plan.
 - b. Maintain a high-level editorial calendar for website and webinars, featuring content planned (e.g. topic, type, etc.) throughout the fiscal year – updated monthly.
- 2. Manage the website presence and its editorial content.**
 - a. Deliver an up-to-date and engaging internet presence maintained, including curating and editing a dynamic range of blogs, papers and webinar recordings resulting from working group activities and other learning events. The web content should document and share promising member practices and innovation.
 - b. Publish on the website a quarterly ‘top 10’ list highlighting relevant academic papers identified by thematic and regional leads and promote through the newsletter and social media.
- 3. Support delivery and promotion of webinar series.**
 - a. Promotional materials for FinEquity events
 - b. Promotion of webinars and events via channels such as the newsletter, website, and social media
 - c. Post follow-up materials and recordings to the event page.
- 4. Support member outreach**
 - a. Help grow the COP membership through communications outreach that supports the FY 2023 workplan, including web and social media promotion and activities.
- 5. Support the FinEquity annual meeting**
 - a. Manage the planning of the FinEquity Annual Member Meeting, and other events as needed, including developing marketing materials
 - b. Edit and distribute summary report, PowerPoint library from presentations, press releases, etc, from annual meeting.
- 6. Report communications metrics monthly**
 - a. Compile and report quarterly communications metrics covering newsletter, social media, and website.

Necessary Skills and Experience

- Master's degree in Communications, International Relations/Public Affairs, Journalism, Marketing, Political Science or other related disciplines and at least 5 years of relevant experience; or equivalent combination of the level of education and relevant experience.
- A minimum of five years' experience in writing and/or editing for the web.
- Proven writing and editing skills with an excellent command of English and an ability to convey complex ideas in a creative, clear, direct, and lively style and to help subject-matter experts translate complex topics into clear and engaging blog content that articulates their key messages.
- Experience editing technical materials (substantive/ developmental and copy editing), including at least two years editing blogs; experience working in finance or international development preferred
- Proven experience in designing, developing and producing e-newsletters using different software and/or formatting tools (e.g Constant Contact/MailChimp, Adobe, HTML, MS Outlook).
- Ability to initiate and manage a continuing internal web editorial process and to conceptualize and execute the online packaging of content.
- Strong diplomatic, interpersonal, and team skills; demonstrated client orientation; sensitized in working in a diverse and multicultural environment; ability to work effectively and respectfully with writers of different skill levels, from writers who simply need a copy edit to writers who struggle with message and structure.
- An in-depth understanding and problem-solving approach to project management as it relates to complex, multifunctional projects.
- Ability to leverage online communication tools and methodologies (such as social media management and online monitoring, web analytics, or other online measurement tools) and to lead research efforts that identify and map project stakeholders or intended audiences, and to develop and analyze online communications performance indicators.
- Knowledge and applied work experience in social media principles and Web 2.0 technologies sufficient to execute, lead or advise others in assuring that upcoming online communication and audience engagement tools and channels are fully leveraged.
- Ability to prioritize, work well under pressure and capably handle/juggle multiple tasks within tight deadlines. Experience working with cross-functional teams.
- Experience producing for the web and a basic working knowledge of software packages for page formatting, image management, videos, and content preparation (HTML, Photoshop, Sharepoint, and similar software preferred,).
- Command of AP style
- Excellent organizational skills. Ability to take initiative, personal ownership and accountability to meet deadlines, work under pressure, balance competing demands and achieve agreed-upon results.

Ownership/Control of Work Product/Publication

All materials produced or acquired during the appointment—written, graphic, film, digital audio/video or otherwise—shall remain the property of CGAP unless and to the extent such rights are explicitly relinquished (in whole or in part) by CGAP, in writing. CGAP furthermore retains the exclusive right to publish or disseminate in all languages reports arising from such

materials. In the event of early termination of the appointment or non-renewal upon its expiration, the Consultant shall, if requested by CGAP, deliver to it copies of all materials and data developed with CGAP funds. Any material developed by the Consultant under these TORs may not be used without written prior approval by CGAP the Task Manager.

Authorship and Acknowledgement

CGAP staff will generally be listed as the authors of any publication or other communication that is produced as a result of the research conducted during the appointment. The Consultant's contribution in conducting this research will be acknowledged in any such publication. If, in the reasonable view of the Task Manager, the Consultant contributes significantly to the conceptualization and drafting of any documents created, the Consultant will be listed as co-author, along with the relevant CGAP staff.

Task Manager/Reporting

The Task Manager is the External Affairs Officer supporting CGAP's gender team. CGAP may designate another qualified task manager. The Task Manager has final sign off on deliverables and invoices. The Consultant will report to the Task Manager.

Schedule

All work will be completed between October 15 and June 30, 2023, unless the appointment is extended, or a new appointment is made. The schedule could be further clarified in each subsequent task assignment.

Budget and Payment

The Consultant will be compensated based on a daily rate for services for up to 150 days. The Consultant will also be reimbursed for miscellaneous expenses directly related to the work performed pursuant to these TORs (documented in accordance with relevant WBG policies) with prior written agreement with Task Manager. Payment will be made upon receipt of the payment request through the World Bank system and its approval by the Task Manager.

Confidentiality

All knowledge and information not already within the public domain which the Consultant may acquire from CGAP or its employees or by virtue of the assignment shall for all time and for all purposes be regarded by the Consultant as strictly confidential and held in confidence and shall not be directly or indirectly disclosed by the Consultant to any person whatsoever excepting with the World Bank written permission. All outputs of the work, materials produced in the

course of the work, and all by-products shall remain confidential unless the World Bank authorizes public release.