



Terms of Reference

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

From: November 1, 2021

To: June 30, 2022

Task Manager: Andrew Johnson

To Apply: Send CV and cover letter to ajohnson11@worldbank.org by October 25, 2021.

About CGAP

The Consultative Group to Assist the Poor (CGAP) is a global multi-donor partnership dedicated to advancing financial inclusion for the poor. CGAP plays a unique role as a donor-coordination mechanism for funders working to improve the lives of poor people through the power of financial inclusion, providing a valuable platform for information, dialogue and reflection to advance progress towards a collective vision. Using action-oriented research, CGAP tests, learns, and disseminates knowledge intended to help build inclusive and responsible financial systems that move people out of poverty, protect their assets, and advance broader global development goals. CGAP leverages its relationships with businesses, governments and the non-profit sector to share insights, mitigate risks and protect customers, and help others bring solutions to scale. CGAP serves as a global advocate for the financial inclusion community by collaborating with strategic institutions that influence policy and market development and providing evidence-based research and practical lessons that guide their work.

CGAP is supported by more than 30 partners including bilateral and multilateral development agencies, development finance institutions and private foundations committed to advancing financial access for the poor. CGAP is housed in and administered by the World Bank.

CGAP is guided by a five-year strategy and annual workplans. The next five-year strategy, CGAP VI, covers the period July 1, 2018-June 30, 2023 and is built on a theory of change that has identified four collective outcomes:

- Customers have information, incentives, trust, confidence and networks to participate in the financial system;
- Providers offer affordable, responsible, and accessible financial solutions for poor people that are sustainable and at scale;
- An infrastructure that enables ubiquitous, efficient, open and safe markets is in place; and
- A policy and regulatory framework for responsible financial inclusion is in place and enforced.



To contribute toward achievement of these outcomes, CGAP’s strategy has identified four priority technical areas including:

- Creating customer value;
- Emerging business models;
- Enabling infrastructure; and,
- Next generation policy.

Additionally, CGAP will continue to provide industry-level support to share knowledge and scale impact beyond its core partners. This will include improving global learning on impact evidence, supporting CGAP’s members, and focusing on capacity development to scale learning with providers and policymakers.

Implementation of CGAP VI is carried out by the Operational Team through a “portfolio of projects” designed to achieve the high-level collective outcomes articulated in the theory of change.

About FinEquity

[FinEquity](#), the community of practice to advance women’s financial inclusion globally, is convened by CGAP. It is a program of the Segments and Insights Project. FinEquity has a global membership base spanning individuals working with donors, research institutions, financial service providers, technical assistance providers, and non-profit organizations. It uses various digital platforms and in-person events to effect its strategic objectives which are to: connect members, foster knowledge sharing, facilitate learning, and promote influence amongst members to improve impact. FinEquity members pursue women’s financial inclusion as a means to broader economic empowerment. FinEquity learning themes are: Gender Transformative Solutions; Digitally Enabled Financial Inclusion; and Impact Pathways. Each theme has a Lead responsible for designing and leading activities. FinEquity also plays an integral in CGAP’s staff capacity building, project development, and influence.

Scope of Work

The consultant will work closely with the task manager, other members of the communications team, and subject-matter experts across CGAP and beyond. S/he will also work closely with the FinEquity facilitator and thematic leads to provide communications support to the FinEquity secretariat and [online platform \(3 days per week\)](#). In addition, the consultant will work closely with CGAP’s blog editor to provide editorial support to CGAP’s [blogsite \(1 day a week\)](#).

The consultant may be required to undertake any of the following based on FinEquity’s strategic priorities and workplan:

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 existing channels; reviews products and shepherds them through editorial processes. Reviews and monitors online assets for quality and timeliness, as well as for compliance with the 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.
- **Content Creation:** Supports the FinEquity facilitator and thematic 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, 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 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.

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.

Design

- Designs and develops content for flyers, posters, event displays, and presentations.
- 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 leads to use a consistent style and branding.

In addition, the consultant may be asked to engage in the following type of work in relation to the CGAP blog:

- Assisting the task manager with the evaluation of blog pitches and outlines
- Substantive/developmental editing to ensure posts have a clear message, engaging introduction, compelling supporting details, helpful visuals, and logical structure
- Copy editing to ensure posts are clear, follow AP and the World Bank style guides, strike an appropriate tone, are free of grammatical errors and broken links, include proper citation/attribution, and fall within the word limit of 700 - 1,000 words
- Selecting photos that are appropriate for blog posts in terms of optics and subject-matter
- Working with bloggers to incorporate tables, charts, or other visuals into posts, formatting or recreating tables and charts in DataWrapper, PowerPoint, Word, and Excel, as needed
- Uploading, formatting, and publishing blog posts on website, editing HTML as needed
- Drafting and reviewing content used by social media team to promote blog posts
- Maintaining CGAP blog calendar and content tracker

The consultant will carry out these responsibilities independently, while keeping the task manager informed and connecting with the task manager, as needed, for guidance and support. The consultant will demonstrate professionalism in her/his interactions while representing the CGAP communications team

Deliverable(s)

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

For FinEquity:

- 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:**
 - Work with the FinEquity facilitator, thematic leads, and CGAP communications specialists to develop an influence strategy and communications plan.
 - 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.**
 - Deliver an up-to-date and engaging internet presence, including by 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 showcase promising member



practices and innovation.

- Publish on the website a quarterly ‘top 10’ list highlighting relevant academic papers identified by thematic leads and promote through the newsletter and social media.

3. Support delivery and promotion of webinar series.

- Promotional materials for FinEquity events
- Promotion of webinars and events via channels such as the newsletter, website, and social media
- Post follow-up materials and recordings to the event page.

4. Support member outreach

- Help grow the COP membership through communications outreach that supports the FY 2022 workplan, including web and social media promotion and activities.

5. Support the FinEquity annual meeting

- Edit and distribute summary report, PowerPoint library from presentations, press releases, etc, from annual meeting.

6. Report communications metrics monthly

- Compile and report quarterly communications metrics covering newsletter, social media, and website.

For the CGAP blog:

- Blog posts consistently edited to standards described in scope of work and in a timely fashion, such that CGAP is able to publish 1-2 posts per week
- CGAP blog calendar and content tracker maintained on a regular basis with current deadlines, target publication dates, and status notes

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 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 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.
- Fluency in English is required and Spanish an advantage.

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 Andrew Johnson. 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 November 1, 2021 and June 30, 2022, 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 140 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.