

Terms of Reference

Thematic Area: Communications
Project Title: CGAP Online Communications Consultant
From: September 15, 2021
To: June 30, 2022
Task Manager: Natalie Greenberg, CGAP External Affairs Officer

To Apply: Send CV and brief cover letter to ngreenberg@worldbank.org by September 21, 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 current strategy, CGAP VI, covers the period July 1, 2018-June 30, 2023. Our mission is to advance the lives of poor people through financial services by helping them to build resilience and create opportunities. We do this through three dimensions – income-generation, essential services, protection. Our work 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 has a cross-cutting priority of advancing financial inclusion for women, and we 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.

Scope of Work

To implement our ambitious workplan, CGAP publishes approximately 30 knowledge products (publications, slide decks, infographics) and 80 blogs each year on our website www.cgap.org. We reach a variety of key stakeholders through this research, including policy makers, private sector actors, funders, and financial services providers. CGAP also convenes partners through events (in-person when possible and an active virtual schedule of webinars/meetings).

Under the direction of the Task Team Leader (TTL), the Online Communications Consultant (consultant) will provide a full range of support to CGAP's Communication Specialists. The consultant will be an integral part of the 6-person team, contributing toward the overall success of the communications plans and measurement of their success. These tasks will include, but not limited to social media, designing and creating certain digital marketing materials, updating website content, preparing event pages, maintaining distribution lists, tracking progress on knowledge products, and extracting and analyzing digital analytics in preparation for impact reports.

Methodology and Specific Tasks

The consultant will work under the immediate direction of the External Affairs Officer responsible for the website and social media platforms, and will provide support across the whole communications team with an emphasis on the following areas:

1. Social Media – CGAP's communication team is working to increase marketing and engagement via social platforms in order to amplify CGAP's voice and influence in the financial inclusion space. Specifically, the consultant will:

- Draft content for social media channels (Twitter, LinkedIn, Facebook). Once messages are approved, consultant will schedule over Hootsuite and create social media packages.
- Identify existing content for repurposing and promotion over social channels.
- Create digital postcards utilizing CGAP brand.
- Monitor analytics for social media content and create web metrics reports as requested.
- Share recommendations with CGAP staff and consultants how to leverage their social networks in promoting CGAP content and messages.

- Help develop and maintain a list of influencers and partners for event outreach, stakeholder engagement, and amplification.
- Help develop and implement CGAP's overall social media engagement strategy.
- Maintain calendar of priorities for content to promote on social media.

2. Newsletter and Email Marketing – CGAP distributes a bi-weekly newsletter to ~20,000 subscribers via the platform Constant Contact. We also distribute ad hoc mailings on key publications and events. Specifically, the consultant will:

- Maintain an editorial calendar and ensure all content has been accounted for in CGAP's bi-weekly newsletter.
- Draft newsletter (using template) and schedule once it has been reviewed and approved.
- Prepare specific mailings for event invitations.
- Maintain segmented mailing lists; add names to lists as requested.
- Maintain calendar of outreach via Constant Contact so that we have coordinated efforts around when we push out content.

3. Website Updates – Website updates will emphasis highlighting new content on the homepage as well as posting publications and events. Specifically, the consultant will:

- Maintain a calendar for homepage and research updates.
- Update CGAP topic pages as requested.
- Update website events page for webinars based on copy provided by Communications Specialists.
- Implement tagging of content on website as needed (collections, topics, etc.)
- Ad-hoc minor website text updates.

4. Outreach to Partner Organizations

- Submit materials to partner websites and social channels.
- Post events on relevant World Bank websites.

5. Analytics Support – CGAP produces two key reports annually, as well as on-demand analytics to assess impact of content. The team uses Google Analytics as well as the program Whatagraph to create reports. It can also leverage native data and standard Hootsuite analytics. Specifically, the consultant will:

- Support team in updating content analytic trackers
- Respond to ad-hoc requests for analytics.
- Create short monthly overview of website KPIs.

6. Other ad-hoc assignments

- Work independently on routine projects and programs, seeking guidance on complex issues as needed.

Necessary Skills and Experience

- Typical candidate will possess a relevant Master's degree with 2 years of experience or equivalent combination of education and experience.

- Experience creating social media content and supporting social media campaigns, ideally in topics related to international development.
- Proven design experience (ideally including social media digital postcards, infographics, PowerPoints).
- Proven experience in designing, developing and producing e-newsletters using different software and/or formatting tools (e.g., Constant Contact, Mailchimp, HTML).
- Ability to implement internal web editorial process and to execute the online packaging of content. Experience with CMS (Drupal a plus).
- Ability to leverage online communication tools and methodologies, including web analytics, or other online measurement tools. Ability to use Excel to analyze data.
- Preferred knowledge of analytics tools such as Hootsuite or Google Analytics.
- Ability to take personal ownership and accountability to meet deadlines, work under pressure, balance competing demands and achieve agreed-upon results.
- Strong interpersonal, and team skills; sensitized in working in a diverse and multicultural environment.
- Exceptional communication skills. Fluency in English is required and in any other official language of the UN- is a plus.

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 Natalie Greenberg, External Affairs Officer. 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

This assignment is envisioned for 90 days. All work will be completed between October 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 90 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 CGAP procedures) or 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.