



INVITATION OF PROPOSAL

for

Marketing and Promotion of the Program

'Country Level School Ranking (CSR) - 2017'

Give Globally Foundation
(Registered as a Nonprofit in the States of Indiana, USA)
120, East Market Street, Suite 808, Indiana Polis, IN 46204
www.csr.givegloballyfoundation.org

Organized By



**GIVE GLOBALLY
FOUNDATION**

REJUSTIFYING SUSTAINABLE ECONOMIC, POLITICAL AND SOCIAL JUSTICE
Networking | Fund Raising | Capacity Building | Consulting | Research | Training



**LEAD INDIA
FOUNDATION**

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1. Terms of Reference (TOR)

1.1 The Need

The demand for Ranking of the schools for various purposes has increased tremendously over the last few years. As India looks to position itself as a knowledge center for different sectors like: Information Technology, Finance, Retail, Infrastructure, Manufacturing, Pharmaceuticals, Energy etc., there is an increasing demand for Knowing the Education Sectors well and what is the potentiality of a particular educational institution in the area has anxiously been asked by the parents that makes their children Proud of their schools.

This is where the role of a CSR 2017 becomes important whose aim is to provide small and medium size Educational Institutions Third party recommendation and Identification, with advice on their goals and future direction so that they can plan effective strategies for growth in the locality. These Educational Institutions use expertise, industry experience and analysis of market opportunities available vis-à-vis their students and staff capabilities to help them identify strategies that will increase revenue and market share by improving competitive advantage. CSR 2017 can thus help clients / companies grow faster and increase the value of their business.

Realizing the above need, CSR 2017, an innovative initiation of Give Globally Foundation, USA has decided to promote the program across the country in collaboration with Lead India Foundation, India and IAO USA and certain Other International Standard and accreditation providing organizations in India for “Country-Level School Ranking 2017”, after which the programme launch for this Event may be initiated for the Ranking of the Secondary and Higher Secondary Educational Institutions in India.



1.2 Objectives of CSR 2017

The Program objectives shall be developed keeping in mind the following objectives:

- To provide a comprehensive overview of the Benefits of School Ranking at the local, state and National Level landscape, the market, its evolution and future challenges
- To give insights on the roles and functions of an Educational Institution and impart basic understanding of the knowledge, skills and attitude desirable for a growth and maintain the quality of the institution.
- To bring a positive approach in making the School more competitive in the Local, State and National level so that parents, management, staff and student can easily be known about their Schools.
- To familiarize educational institutions with the necessary models and mechanisms for addressing their marketing needs, strategic requirements of parents and students that drive growth of businesses by providing result oriented schooling.
- To prepare the staff working in institution for their internal development roles in addressing the rank of the schools in the City, state and country level.

1.3 Scope of Work:

The project shall be an Marketing and promotion of the program related work, the agency or individual requires to do indecently without maximum assistance from give globally foundation or its promoters, it should have the proper marketing and promotion approach with event management capabilities and the event and all the activities related to this program to be delivered through Marketing, registration and event promotion activities within a time period.

The agency / individual expert is required to execute the following tasks in connection with the contents development for the course contents:

- Develop the Marketing, advertisement and promotion strategy for the CSR 2017 program, comprising approach to the schools, giving exact and accurate information including suggested activities for the target participants
- Prepare Power Point Presentations for each of the activity for the promotion of the event



- Prepare Guidelines for the registration of the schools and promotion of the program.

The coverage of the program promotion shall focus on the following broad aspects:

- Introduction to Basic Concepts: Introduction to Technical Areas of Ranking of educational institutes, Differences between institutional accreditation and institutional Ranking, Overview of the Educational Ranking strategies: Market and Players in Ranking, Types of Ranking , Internal Consulting Roles, Skills & Competencies required for Educational Ranking Dynamics of Education Business Environment, the Market Structure, Industry,

Competition and Competitors' Analysis, Identification of Critical Success Factors & SWOT Analysis, Importance of Market Intelligence and Knowledge about different types of strategies applicable to various stakeholders in consulting market as well as focus on Emerging areas / concepts in Educational Ranking.

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- Understanding the Vision & Mission, Ethics & Values, Organization Culture in Ranking Strategy, Stakeholders' influence on Strategy, Process of third party recommendation strategy formulation at different levels of an organization i.e. Corporate, Business and Functional levels including the relationship between them and Evaluation of Strategic Options and Final Selection
- Acquaintance with different Tools, Techniques, Models & Mechanisms for Strategy Execution based on assessment of real-world scenarios for providing solutions to the strategic requirements of client organizations and preparing professionals for dealing with upcoming issues in education market like Managing and Leading Change / Transformation / Restructuring, Performance Improvement, Expansion, Mergers, Diversification, Product Development etc.
- Process for Institution Ranking including Project Sales Cycle, Understanding the Client Problem, Preparation of a Proposal including Scoping and Contracting, Pricing & Negotiations, Project Delivery Cycle involving research, analysis and assessment of growth scenarios & strategic options, Project Governance, Project Implementation and Impact Analysis to assist management of client organizations in taking more informed decisions, Assessment of future Up sell / Cross sell opportunities in strategy consulting



1.4 Approach & Methodology

The agency / individual expert should give an overall approach towards execution of the assignment so that it achieves the objectives and covers the entire scope for CSR 2017. It should further indicate the delivery mechanism, including the suggested brand building required to be initiated for ensuring successful launch of the program.

1.5 Deliverables & Milestones

Deliverables

The deliverables shall be the Marketing strategy and the registration of the schools, comprising of the following activities:

- Pre-Marketing Preparation: Comprising of different approach to connect, convince and convert schools to participate in the CSR 2017 program. Further, each activity shall also cover suggested Marketing and sales idea for the target participants which may include References to Media and Newspapers, Journals, Websites, Articles, and Whitepapers etc.
- Power Point Presentations for each of the Marketing strategy

Guidelines for marketing Executives, including Marketing strategy for the delivery by executives who will be convincing the schools

Milestones

A detailed Inception Plan in 2 weeks from date of award of work discussing the execution plan in minute details

Draft Marketing Material within 2 weeks from date of award of work

Final Marketing material in 2 weeks from the receipt of comments on the Draft Marketing Material

1.5 Time frame

The development of the Marketing, Registration and Event Celebration is to be completed strictly within a time frame of 5 months from the date of the Award of Contract.



2. General

2.1 Eligibility Criteria

The Program Promoter (i.e. Agencies / individual experts) must meet the following Eligibility criteria -

- Should have minimum of 5 years' experience in Educational related sales and Marketing /Education Institution Liasoning/Third Party Recommendation or appreciation/ Educational consultant as on **4th November 2016**.
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- Should have executed minimum 3 assignments of similar nature in last 5 years as on **4th November 2016**.

(Note: Proposals submitted by a consortium are not acceptable in case of both the agencies as well as the individual experts.)

Documentary evidence for the following must be submitted in respect of the eligibility criteria:

- a) Proof for Registration: Certificate of Incorporation in case of Public / Pvt. Ltd. Companies, Partnership Deed and Certificate from Registrar of Firms in case of partnership firms, Certificate of Registration of Societies in case of Registered Society, any other proof for Registration as applicable in case of Proprietorship Firms / Individual experts etc.
- b) Contract / Work /Engagement orders indicating the details of assignment, client, value of assignment, date of award etc.

2.2 Proposal Submission

Each proposal should be submitted in two parts, viz.

- Technical**
- Financial**

The technical and financial proposal must be submitted in two separate sealed envelopes indicating clearly on envelopes as "TECHNICAL PROPOSAL" and "FINANCIAL PROPOSAL", followed by the nomenclature of the Program, "**Country Level School Ranking 2017 Name of the Zone (East, North, South, West, North East)**". Financial proposal to include a warning "DO NOT OPEN WITH THE TECHNICAL PROPOSAL." The envelopes containing the Technical and Financial Proposals shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address.



2.3 Technical Proposal Contents

Technical Proposal should be prepared considering Objectives, Scope, Approach & Methodology, Milestones & Deliverables as well as other information given in this document.

Technical Proposal must include:

a. Brief description about the Consultant

b. **Consultant's experience**

In addition to overall experience of the consultant, details of specific projects on Educational related sales and Marketing /Education Institution Liaisoning/Educational consultant executed may be provided including Assignment/job name, description of services provided, approx. value of assignment, country & location, duration of assignment, name of client, starting & completion dates, names of associates (other than employees), if any. *(Documentary evidence in support of above facts to be provided)*

c. Comments and suggestions on understanding of Terms of Reference.

d. Approach

e. Methodology

f. Work Plan and Schedule

g. Detailed profile and CV of manpower proposed to be associated with this assignment.

2.4 Financial Proposal Contents

Financial proposal should be in the form of a **Lump sum Event and Marketing cost + Service Tax** as applicable.

The lump sum consulting fee should be inclusive of all expenses which consultant may incur while executing the assignment including travel, boarding and lodging within India including visits to Give Globally Foundation USA or Lead India Foundation, India, as required.

Financial Proposal, should also, include a breakup of the lumpsum quote under various heads envisaged by the consultant.



2.5 Evaluation of Proposals

Technical Evaluation

The following evaluation criteria shall be used for technical evaluation.

Sr. No	Description	Break up
1	Past Experience in work of similar nature executed in last 5 years as on 4th November 2016	25 Marks
1.1	Past experience of similar nature in terms of no. of assignments executed No. of Assignments Executed in last 5 years o No. of Assignments =3 o No. of Assignments >3 and <6 o No. of Assignments = 6 & above <i>(Marks will be awarded based on Work order / completion certificates of assignments executed enclosed along with the Technical proposal)</i>	20 Marks 10 15 20
1.2	Assignment done on Marketing and Development in the area of Education	5 Marks
2	Methodology, Work Plan and Understanding of TOR	50 Marks
2.1	Understanding of TOR	15
2.2	Approach and Methodology	30
2.3	Work Plan + Time Schedule	5
3	Suitability of Key Personnel, including skills & competencies (The Consultant must submit relevant CVs to support experience indicated at Sr. Nos. 3.1 and 3.2)	25 Marks



3.1	Relevant Experience in Strategy Consulting o Average No. of Yrs. of Relevant Experience ≥ 5 and < 7 o Average No. of Yrs. of Relevant Experience ≥ 7 and < 10 o Average No. of Yrs. of Relevant Experience ≥ 10	10 Marks 5 7 10
3.2	Relevant Experience in Content Development o Average No. of Yrs. of Relevant Experience ≥ 5 and < 7 o Average No. of Yrs. of Relevant Experience ≥ 7 and < 10 o Average No. of Yrs. of Relevant Experience ≥ 10	15 Marks 7 10 15
Total		100 Marks

Threshold for shortlisting Consultants in technical evaluation will be 80 marks (eighty marks). Give Globally Foundation shall short list all the Consultants who secure the minimum cut off of 80 % (Eighty Percent).

Financial Evaluation

The financial proposals of only technically shortlisted consultants will be opened and will be ranked in terms of their total evaluated cost i.e. lump sum cost, exclusive of service tax. The least cost proposal will be ranked as L-1 and the next higher and so on will be ranked as L-2, L-3, etc. The least cost proposal (L-1) will be considered for award of contract.

Evaluations will be based on documentary evidence submitted by the applicant with respect to evaluation / selection criteria.

Note: The following **supporting documents for technical evaluation** (in addition to all other documentary evidences mentioned in this document elsewhere) should be provided along with the Technical proposal: -

- Contract/Work/Engagement orders indicating the details of assignment, client, value of assignment, date of award, date of completion etc.
- CVs of Key Personnel for the project

(Responses to 'Invitation of Proposal', not accompanied with documents requested above, may be summarily rejected).



2.6 Amendment to Invitation of Proposal

- a. At any time prior to the deadline for submission of proposals, Give Globally Foundation may, for any reason whether its own violation or in response to clarifications requested by bidders, modify the Invitation of Proposal document by issuance of an Addendum/ Corrigendum.
- b. Any Addendum/ Corrigendum will be uploaded in the website of Give Globally Foundation www.csr.givegloballyfoundation.org. Under **the Section on 'Business Opportunities' / 'What's New'** one week prior to last date of submission and bidders are advised to see the website. The addendum/ corrigendum then issued will be a part of the 'Invitation of Proposal' and any Proposal without Addendum/ Corrigendum, if any, will not be considered.

2.7 Validity

The proposal shall be valid for 15 days from the last date of submission of the proposal.

2.8 Payment Terms

Payment Terms	Milestones
USD 2500	30 Days of signing the Contract
20% of Registration	The Total Registration fees will be divided in 25 is to 75 ratio. 25% share will be taken by Give Globally Foundation and its associates. 75% of the registration fees will be for the Promoter of this event. Out of 75%, 20% will be released 7 days after the completion of the Registration of Institutions.
50% of Registration	Within 7 days of completion of the survey for the evaluation
30% of Registration	On Successful completion of the event and its publication in Give Globally Website and Newspapers.

Apart from the above the organization will appoint 5 employees till the end of the program, for the marketing and promotion of the Program with a salary below 500 USD per month. In this way every month the company will provide 2500 USD Per Month to the Business Promoter for the disbursement of salary.

5 Laptops will be provided to the employees through business promoter costing approximately 3000 USD.



2.9 Date for submission of proposal

The Proposals must be sent to GIVE GLOBALLY FOUNDATION office on or before 15th **August 2017** by **3:00 P.M.** The proposals have to be sent only in hard copy by post/courier/by-hand. Emails will not be considered for India office, but, people having problem in hardcopy submission, the soft copy should be sent to info@givegloballyfoundation.org. The proposals for tender will be opened on **3rd August 2017** at **12:00 A.M.**

Notes: -

- 1) *GIVE GLOBALLY FOUNDATION reserves the right to accept or reject any or all proposals without assigning any reasons thereof.*
- 2) *Responses to 'Invitation of Proposal' not accompanied with documentary evidence requested above, may be summarily rejected.*

3. Tender Specific

3.1 Introduction to Give Globally Foundation and CSR 2017

Give globally foundation is non Profit Registered in the States of Indiana, having its office at Indianapolis, Indiana, USA, launches the CSR 2017 in collaboration with Lead India Foundation and Careernext Education, Training, Research and Consultancy Pvt. Ltd. in India. Lead India Foundation is one of the India's highly popular networking organization working with more than 200 NGOs and Educational Institutions in India with the leadership of Mr. Manoj K Pattanaik, International Director.

Country level School Ranking is the initiative of Give Globally Foundation, to provide Third Party appreciation/ appraisal/ recommendation to a School of Secondary and Higher Secondary level through ranking which will provide the educational institutes a great identification in the local level and National Level.



3.2 Introduction to Invitation of Tender

Give Globally Foundation, along with its India Promoter intends to carry out this program through the tender. Where interested parties/ agencies/organizations/ marketing agencies. Individuals having the experience of 5 years in the field of educational marketing or institutional liaison may participate to promote this program across the country.

To carry out this program in a very successful way, we have divided the area of event promotion in India in five different zones, but we require the EoI of the Tender for three zones only, which are as below:

1. **North Zone (Delhi, Punjab, Haryana, Himachal Pradesh, UP)**
2. **East Zone (Bihar, Jharkhand, Chhattisgarh, West Bengal, Odisha)**
3. **North East Zone (All the North East states)**

3.3 Nature of the Tender

It is purely contract basis with a success and profit based approach. The interested party/ies need to pay a certain amount to have the contract to carry out the activity, they will do all the marketing and promotion activities in India on behalf of Give globally Foundation and its associates/promoters, strictly with the provided guideline. They will do the registration of the Schools in their respective Zones as per the guideline of Give Globally Foundation and its promoters, which should be signed on a 100 INR stamp paper at the time of contract. The more schools involved the more profit they will get. Up to 25% of the registration fees will be taken by Give globally foundation and Rest of the amount will be disbursed to the agency as per the details mentioned in Section 2.8 Payment Terms.

3.4 Cost of the Tender

The Cost of the Tender is USD 25000, of which 10% i.e. 2500 USD will be deposited during the time of Submission of the tender. If the Tender is not approved, the whole amount will be refunded after the deduction of 20% handling charge. The Rest of 90% will be deposited after the approval and before the contract.

All the Tenders will get a 20% relaxation, if the project becomes a liked project by the International Director of Lead India Foundation, Mr. Manoj K Pattanaik.



3.5 Important Dates of the Tender

The Tender Opens on Midnight 3rd August 2017

The Tender Closes by 15th August 2017

Tender Gets Approval: 7 working Days of the closing of tender

Full Tender Amount to be Deposited within 5 days of approval, or the approval will be cancelled in that case no deposit will be refundable

Contracts will be signed within 5 days of deposit of the Full amount.

All the Times will be as per the Eastern Daylight Standard Time (EDT) as per our Indianapolis, Indiana office.

Please submit your proposals to:

mail: info@givegloballyfoundation.org.

Website: www.givegloballyfoundation.org.

Soft copy should be sent to

info@leadindiafoundation.org and info@givegloballyfoundation.org

With all required Documents.
