

REQUEST FOR PROPOSALS

**North American Pollinators Campaign
and Digital Communications Materials**

for the project

Advancing Pollinator Conservation throughout North America



Commission for Environmental Cooperation

2023

I. Overview

The Commission for Environmental Cooperation (CEC) is requesting proposals from prospective consultants to develop a comprehensive North American Pollinators campaign and digital communications materials highlighting the importance of pollinators and promoting their conservation. The consultant is expected to carry out their work until the end of 2023.

The Commission for Environmental Cooperation (CEC) was established in 1994 by the governments of Canada, Mexico and the United States through the North American Agreement on Environmental Cooperation, a parallel environmental agreement to NAFTA. As of 2020, the CEC is recognized and maintained by the Environmental Cooperation Agreement parallel to the new Free Trade Agreement of North America. The CEC brings together a wide range of stakeholders, including the general public, Indigenous People, youth, nongovernmental organizations, academia, and the business sector, to seek solutions to protect North America's shared environment while supporting sustainable development for the benefit of present and future generations. Find out more at: www.cec.org.

The CEC's Council, its governing body, approved the project *Advancing Pollinator Conservation throughout North America* as part of the 2022 Operational Plan, with the purpose of sharing best practices, strategies and tools to organize and mobilize native bee inventories and monitoring, and developing materials to communicate the importance of pollinators and drive conservation action. For a complete description of the project, including tasks and related budget, please visit the CEC website at: <http://www.cec.org/advancing-pollinator-conservation-throughout-north-america/>.

II. Terms of Reference

A. Overview and Scope

One of the objectives of the *Advancing Pollinator Conservation throughout North America* project is to develop tools and communication materials to drive action. This will be met by communicating the environmental, social, and economic benefits of pollinators for communities, food production, and natural ecosystem functioning.

The scope of this work includes developing a comprehensive North American Pollinators campaign, which promotes pollinator conservation and highlights the importance of pollinators, and creating digital communications materials that can be used to engage audiences and promote the campaign.

As a result of this work, the North American general public and specific targeted audiences will have access to communications tools and materials on the importance of pollinators and how they can take action for pollinator conservation.

B. Description of Services

The consultant shall coordinate with the CEC's designated contacts to accomplish the following tasks:

1. Develop a North American Pollinators campaign strategy and implementation plan, in collaboration with the CEC and building on existing input from pollinators and communications experts, that includes, but is not limited to:

- 1.1. Identification of target audience(s) and potential partner individuals, organizations and/or nodes capable of activating the target audience(s), including existing CEC partners (government agencies, experts and other organizations), and of opportunities for alignment with these organizations and potential partners
 - 1.2. Key messaging and branding guidelines, in alignment with the CEC branding guidelines
 - 1.3. Multi-channel outreach plan (social media, email marketing, website content, etc.)
 - 1.4. Plan for engagement with partners and stakeholders and recommendations for distribution and dissemination of the communication material to reach a wide audience, including developing partner/open-source content and/or identification of blogs or a newsletter that could share our campaign materials
 - 1.5. Creative concepts and tactics for the campaign, including planning for the communication materials, posts and assets, a list of hashtags to be used throughout the campaign and lists of relevant organizations to tag on social media based on the content of the posts
 - 1.6. Key performance indicators and metrics for tracking and evaluating the success of the campaign
 - 1.7. A detailed timeline of work to be carried out until the end of 2023
2. Create regular social media capsules / short digital communications or materials for a North American Pollinators campaign for [the CEC's Facebook, Instagram, Twitter, LinkedIn, Youtube, Medium](#) and other relevant platforms.
 - 2.1. In collaboration with the CEC and the Project Steering Committee, conduct research and propose materials and content for campaign materials, including monthly social media capsules for a North American Pollinators campaign throughout 2023 and evergreen content for 2024 and beyond, on selected topics such as the importance of pollinators, geospatial tools of native bees distribution ([the Bee Tool](#)), a showcase of protected areas for pollinators, etc.
 - 2.2. Propose strong key messages and calls to action on the decline of pollinators and their conservation that are intended to lead to human behavior changes, and propose the best way (best format) to disseminate these messages to communities, the general public and decision-makers. The messages should draw attention to existing resources in North America.
 - 2.2.1. In collaboration with the CEC and the Project Steering Committee, suggest key calls to action for people interested in pollinator conservation so they know what they can do to help and how they can do it (e.g., plant native plants, with links to resources).
 - 2.3. Develop visually appealing and consistent graphic design for all campaign materials (ensuring that the design is flexible to accommodate other languages and incorporate any required branding or logos), including, but not limited to:
 - 2.3.1. Social media graphics and posts, including:
 - 2.3.1.1. Content for monthly capsules until December 2023
 - 2.3.1.2. Evergreen content for use by the CEC throughout 2024 and beyond, for example for the 2024 World Bee Day, Pollinators Week, etc.
 - 2.3.2. Infographics and data visualization (TBD, as necessary)
 - 2.3.3. Videos and animations: develop concepts, create scripts, storyboards and shot lists, produce the videos, and deliver the files in various formats optimized for social media platforms. The videos could focus on topics such as:
 - 2.3.3.1. Promoting [CEC's work on pollinators](#)
 - 2.3.3.2. Promoting [the Bee Tool](#)

- 2.3.3.3. e-learning videos on different topics, such as: how to create and preserve pollinators habitat, how to plant a pollinator garden with plants native to your area, how to make agriculture more pollinators friendly, etc.
 - 2.3.3.4. Short videos for social media, highlighting the importance of North American pollinators
 - 2.3.4. Website content (TBD, as necessary)
 - 2.3.5. Newsletter content (TBD, as necessary)
3. Develop a digital postcard or other visually appealing communication material on conservation of native bees:
 - 3.1. In collaboration with the CEC and the Project Steering Committee, conduct research, ensure that the communication material is scientifically accurate, well-researched and appropriate for the target audience, and propose material for a digital postcard, including:
 - 3.1.1. key messages related to the decline of native bees (including information on native bees and their habitats, their ecological significance and current threats to their survival), the importance of pollinators and the need for action
 - 3.1.2. a set of approximately nine calls to action for conservation of native bees, such as creating and preserving their habitat by planting native plants to your area, etc.
 - 3.2. Develop the graphic design for the digital postcard or other material and also provide the file in print-ready format.
 4. Develop and implement a media buying strategy to ensure that the social media posts from the North American Pollinators campaign reach their target audience and foster wide dissemination. The media buy will include paid advertising, promotions, and other tactics to amplify the campaign's message. The consultant should carry out but not be limited to the following components:
 - 4.1. Develop a media buying strategy that aligns with the campaign's objectives and target audience, including identification of the most effective social media platforms and/or other channels for the campaign's message, and development of a budget for media buying that maximizes the impact of the campaign.
 - 4.1.1. This should focus on paid media, ads and/or sponsored posts on the CEC's social media platforms, but could also include influencer outreach, TV ad buy, or ads in magazines and other printed platforms, according to the relevant national context in Canada, Mexico and the United States, and to what is achievable within the workplan's timeline.
 - 4.2. Create and place ads on social media platforms and/or other channels that align with the campaign's messaging. Note that the funds allocated to the consultant will cover all coordination with trade publications to place ad buy and the cost of the advertisements.
 - 4.3. Monitor the performance of the media buying campaign and adjust tactics, as needed.
 - 4.4. Provide the CEC with ad specs and timelines.
 - 4.5. Develop a media buy campaign wrap report, including, but not limited to, an overview, summary, final results (and such relevant metrics as total posts, impressions, reach, digital engagement, direct website visits, etc.), highlights and recommendations.

Deliverables

1. A comprehensive North American Pollinators campaign strategy and implementation plan.
2. A suite of social media capsules and communications materials that are on-brand and visually engaging, including videos.

3. A digital postcard or other relevant materials on native bee conservation.
4. A media buying strategy outlining channels, tactics, and detailing the placements, timing, and budget for the campaign's ads.
5. A wrap report on the performance of the media buying campaign, including such metrics as reach and engagement.

Translation Arrangements

The CEC will arrange translation to other languages (English, French and/or Spanish) of materials as required. These costs will be borne by the CEC and should not be included in the budget breakdown submitted by the consultant.

C. Periodic Reporting Requirements

Throughout the project, the consultant will work in close collaboration with the CEC, the Project Steering Committee, and experts to gather information to support delivery of the work. The CEC Secretariat will forward draft deliverables to the project's Steering Committee and other experts for their review and comment.

The CEC Secretariat will arrange teleconferences with the consultant, the CEC designated staff, and other experts on an as-needed basis. The consultant will work in their own offices.

Provisional timeline of expected deliverables

May 2023	Draft North American Pollinators campaign strategy and implementation plan
June 2023	Final North American Pollinators campaign strategy and implementation plan First social media capsules and digital communications materials that are on-brand and visually engaging Media buying strategy outlining channels, tactics, and detailing the placements, timing, and budget for the campaign's ads
July to December 2023	At least one social media capsule or digital communication material per month
August 2023	Draft digital postcard or other relevant material on native bee conservation
September 2023	Final digital postcard or other relevant material on native bee conservation
December 2023	Wrap report on the performance of the media buying campaign, including metrics such as reach and engagement Evergreen social media capsules and digital communications materials that are on-brand and visually engaging for use by the CEC throughout 2024 and beyond

D. Quality of Deliverables

The consultant is responsible for providing deliverables of **publishable quality** (i.e., copy-edited prior to submission) in English and, when applicable, for the technical editing of the materials. The consultant will submit to the CEC Secretariat all written material (including complete drafts

and final reports) in Microsoft Word when applicable and adhere to the precepts of the [Guidelines for CEC Documents and Information Products](#), as supplemented by the CEC's English [Style Guide](#). Supporting documents for tables, figures and maps will be submitted with the report in their original file format (e.g., Excel or ArcGIS). Note that all amounts shall be presented in metric units. The CEC Secretariat will be responsible, when applicable, for translation, printing, publication and distribution of products from this activity.

Upon delivery by the consultant of a final version of the report or other written materials under the project, the CEC reserves the right to a 15-business day period to review the document(s), notify the consultant of any potential issues or errors, and return the document(s) to the consultant for appropriate corrections, at no extra cost.

III. Requirements and Proposal Evaluation

A. Mandatory Requirements

To be eligible for further consideration, all consultants must fulfill the following basic requirements.

1. In-country Ability

The consultant, as well as all their personnel and subconsultants, must reside and be authorized to work legally in Canada, Mexico or the United States.

2. Key Personnel

For the purposes of this RFP, the term "consultant" may refer to either a group or company or a single individual.

If a proposal is submitted by a consortium of individuals or institutions, a "lead" consultant should be designated to take responsibility for ensuring overall coordination, the coherence of activity outputs, and the integration of information and ideas.

3. Qualifications Required

The consultant must possess competence and experience in:

- Developing successful conservation or environmental campaigns and digital communications materials, including material that convey scientific concepts to a non-scientific audience
- Proficiency in graphic design and social media marketing
- Researching and compiling information
- Understanding of pollinators, their importance to the ecosystem, and the issues facing their conservation.
- Working effectively and with appropriate consideration to social and cultural differences across Canada, Mexico, and the United States

The consultant must be fluent in both written and spoken English; proficiency in Spanish and/or French is desirable.

4. Proposal Submission

It is the intention of the CEC Secretariat to include an adapted version of the **Terms of Reference (Section II)** of this document) in the contract negotiated with the successful applicant.

Therefore, prospective consultants should refer to these for more detailed information on the project and the services to be provided. Prospective consultants are requested not to reiterate the Terms of Reference in their submissions but are invited to suggest modifications to enhance the proposal.

Proposals must include the following:

- A brief statement of interest and intent. This statement should be based upon and serve to demonstrate the consultant’s experience and subject knowledge. The statement should address desired results; guidelines (parameters within which results are to be accomplished); resources (human, financial, technical, or organizational support available to help accomplish the results); and other aspects deemed applicable by the consultant. The purpose of this statement is to demonstrate not only the consultant’s general and specific familiarity with the subject area, but also to highlight writing skills;
- A general work plan for carrying out this project;
- Proposed methodology;
- Suggested modifications to the Terms of Reference, and the reasons for such modifications;
- Resumes of the key personnel involved in the project;
- Detailed cost breakdown, including number of person/days of personnel, direct and indirect costs, and applicable taxes;
- Description of relevant experience and any other relevant information;
- Two samples of previous work;
- Two letters of recommendation from previous assignments

B. Other Information to be Provided

Potential consultants are encouraged to submit any additional information that they believe will assist the CEC Secretariat in the evaluation of their proposal. However, the proposal should not exceed six (6) pages, exclusive of applicant resumes, samples of previous work or corporate brochures.

C. Type of Contract to be Used for These Services

The CEC Secretariat intends to use its milestone-based contract for these services. A sample is available upon request.

All work within the contract must be completed by 15 December 2023.

D. Selection Procedure

The consultant deemed best qualified will be selected on the basis of a competitive process, in accordance with sections 2.5-2.7 of the [CEC Consultant Services Procurement Manual](#).

Proposals that the CEC Secretariat determines to be complete will be evaluated according to the procedure described below. Prospective consultants who submit proposals determined by the CEC Secretariat to be incomplete will be so notified in writing.

Each complete proposal that is submitted will be evaluated by the CEC Secretariat according to the following criteria, with a point rating assigned for each:

Evaluation Criteria	Maximum Point Rating
Experience, qualifications and competency of key personnel	40
Understanding of project requirements and adequacy of work plan	30

Suitability of the proposed approach	10
Adequacy of budget	10
Writing ability	10
Total	100

A minimum score of 80 will be required for the prospective consultant's proposal to be eligible for further consideration. Cost efficiency will be taken into account in the evaluation.

Proposals in response to this request will be evaluated by the CEC designated staff and technical reviewers, who will form an Evaluation Committee. Once the selection has been made, each prospective consultant will be provided with their score—if requested—along with their ranking. However, neither the evaluations nor the scores of other bidders will be provided.

E. Estimated Level of Resources Required

The budget for this activity is **not expected to exceed one hundred and fifty thousand Canadian dollars (C\$150,000.00)**, including professional fees and expenses **and all media buy fees**.

For universities and nongovernmental organizations, note that the CEC accepts that overhead be charged for administration and other indirect costs up to 15% of the total value of the contract.

If the proposal were presented by a consultant established in Mexico, the applicable value-added tax will be 0%, in accordance with Article 29, section IV, paragraph a) of Mexico's VAT Act, as these are technical services that were engaged from abroad.

If a currency other than Canadian dollars is used, the consultant should indicate the total cost of the professional services in Canadian dollars as well as the currency of choice, for comparison purposes.

F. Conflict of Interest

"Conflict of interest" means, but is not limited to, a situation where a consultant's personal interest is sufficiently connected with professional duties under the contract, such that it results in a reasonable apprehension that said personal interest may influence the exercise of professional responsibilities under the contract. For example, a direct conflict of interest exists when the consultant is also a CEC government official or is related to or closely affiliated with a CEC government official, CEC staff member or third party involved with the performance of the services.

The consultant will inform the CEC Secretariat of any circumstance that exist or could manifest during the performance of this contract, which could constitute a conflict of interest. The consultant will complete and sign, on behalf of all their personnel, the attached *Declaration of Acceptance and Impartiality and Independence* (see Annex). The Consultant will also take note of the [CEC Consultant Services Procurement Manual](#).

G. Deadlines for Proposal Submission and Decision

The proposal, including all relevant attachments, must be received by the CEC Secretariat offices by **17:00 EST on 23 May 2023**. Proposals submitted after this deadline will not be considered.

Proposals must be submitted via e-mail to aasselin@cec.org. Proposal format may be in Microsoft Word or Adobe PDF format. Once the proposal has been submitted electronically, the CEC will confirm receipt within three business days. If receipt is not confirmed by e-mail within this time, **applicants must contact the CEC**. The contact person is:

Antoine Asselin-Nguyen
Project Lead, Ecosystems Unit
Commission for Environmental Cooperation
700 de la Gauchetière St. West, Suite 1620
Montreal, QC, Canada H3B 5M2
Tel: 514-350-4300; Fax: 514-350-4314

The CEC Secretariat intends to select the consultant and notify the applicants within a reasonable period of time following the proposal submission deadline.

ANNEX 1 (see also Schedule D in CEC standard contract)

CONSULTANT'S DECLARATION OF ACCEPTANCE AND IMPARTIALITY AND INDEPENDENCE FOR CONTRACT

I, the undersigned,

Last Name: _____ First Name: _____

ACCEPTANCE

hereby declare that I accept to serve as consultant in the subject contract.

IMPARTIALITY AND INDEPENDENCE

(If you accept to serve as a consultant, please check one of the two following boxes. The choice of which box to check will be determined after you have taken into account, inter alia, whether there exists any past or present relationship, direct or indirect, with any of the Parties to the Environmental Cooperation Agreement (ECA) or their Commission for Environmental Cooperation ("CEC") representatives, Secretariat staff, and/or third parties involved in the performance of this contract, whether financial, professional, familial, or of another kind and whether the nature of any such relationship is such that disclosure is called for pursuant to the criteria set out below. Any doubt should be resolved in favor of disclosure.)

I am impartial and independent with respect to the ECA Parties and their CEC representatives, CEC Secretariat staff, and third parties involved in the performance of this contract, and intend to remain so; to the best of my knowledge, there are no facts or circumstances, past or present, that need be disclosed because they are likely to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest.

OR

I am impartial and independent with respect to the ECA Parties and their CEC representatives, Secretariat staff, and/or third parties involved in the performance of this contract, and intend to remain so; **however**, I wish to call your attention to the following facts or circumstances which I hereafter disclose because they might be of such a nature as to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest. Where facts or circumstances exist that might give rise to the latter such doubts, I may set out measures I intend to take to mitigate or eliminate any doubts regarding my impartiality and independence, and/or a possible conflict of interest. (Use separate sheet and attach.)

Date: _____

Signature: _____