

Request for Proposals

Monetization Services for IESC

Issue Date:	15 August 2018
Closing Date For Proposals:	29 August 2018
Closing Time:	5:00 p.m. Eastern Standard Time (EST)
Project Title:	Green-Skin Avocado Marketing Campaign
Bid Reference Number:	EXPORTING QUALITY RFP-001-2018-HO

1. Disclaimer

The information contained in this Request for proposals (RFP) (hereinafter referred to as RFP) document is provided to the Offeror(s) by the International Executive Service Corps (herein after referred to as IESC). The purpose of this RFP document is to provide Offeror(s) with information to assist them in the preparation of their proposals for the services IESC seeks to source. This RFP document does not claim to contain all the information each Offeror may require. Each Offeror should conduct its own assessment and should check the accuracy, reliability and completeness of the information in this RFP document, and where necessary obtain independent advice from appropriate sources. IESC is under no obligation to make an award as a result of this RFP and at its own discretion may award any resulting contract from this RFP on a best-value basis.

IESC may, at its own discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP document. Any contract resulting from this RFP document will be a fixed-price deliverable contract.

2. Background

IESC – the International Executive Service Corps – is a U.S.-based nonprofit that seeks private enterprise solutions to problems of poverty in developing countries and around the world. By providing a mix of technical assistance and volunteer expert support, IESC works with emerging industries, financial institutions, and governments to stabilize economic environments, increase opportunity, and promote growth.

The Exporting Quality Program is being implemented in the Dominican Republic. It works with five value chains, pineapple, cocoa, avocados, greenhouse, and Asian vegetables, and takes a “field to fork” approach, providing technical assistance all along the value chain, including producers, packinghouses, and exporters.

The Dominican Republic is the world's second largest avocado producing country. It produces 420,000 metric tons annually, a number that has been steadily increasing over the last few years. A large percentage of this production is consumed nationally rather than exported, in fact, only five percent of the current production is exported. Green skin avocados dominate the Dominican Republic representing 85 percent of all avocados produced. However, the Hass avocado constitutes approximately 95 percent of the U.S. market.

Of the Dominican Republic's total exports, green skin is 80 to 85 percent with the remaining 15 to 17 percent Hass or a similar variety. The U.S. is the largest export market for Dominican avocados with a share of 78 percent in value, while the EU market represents 18 percent. The Dominican Republic is currently exporting green skin avocados to the United States, where they are mostly sold in ethnic markets along the East coast in Miami, New York, and Boston. USDA has a specific marketing order for green skin avocados that determines by calendar and size when the different varieties can enter the market. The purpose of this marketing order is to minimize the entry of unmaturing fruit into the market. Prime harvest and export season for Dominican Republic avocados is October to March but with 20 different green skin avocado varieties grown, there is a year-round supply.

Due to the limited size of the U.S. ethnic market segment, this segment is saturated with about 40 containers a week during the season. Dominicans need to explore market diversification by testing consumer interest in and acceptance of green skin avocados. Market testing could inform targeting other market segments and teaching those segments how to introduce green skin avocados into their dishes as the green skin does not have the oils or buttery texture of the Hass variety. To do so, they need to work on getting big-customer-tenders and long-term programs with retailers. This requires establishing a Dominican brand and developing a marketing strategy to position it successfully.

Several Hass avocado state-level or country brands have emerged, which include – California Avocados, Avocados from Chile, Avocado from Mexico, Avocado from Peru, and New Zealand Avocado. The only attempt to market green skinned avocados in the U.S. is the "Slimcado" brand by Brooks Tropical in Florida. It promotes the fact that green skinned have less fat and oil content than Hass. Brooks Tropical primarily markets Florida green skin but is now expanding their sourcing of Dominican production. Outside of the "Slimcado" name, there are no branding points of differentiation for the consumer, leaving significant room for confusion, disappointment, and non-recurring buying if the consumer intends to replace recipes that call for the rich oils of the Hass with the green-skin avocado. Guacamole is the primary example where green skin cannot serve the same role. Alternatively, the green skin holds up nicely as a sushi wrap in rice-less sushi and a

nice alternative to seaweed. Moreover, there is potential to promote the green skinned avocados as the "slice, dice, salad" avocados as opposed to the Hass which is the "mash" avocado.

In that context, the Exporting Quality program will adopt a multi-phase strategy to test the positioning of green skin avocado into mainstream market segments interested in new adaptations of healthy food alternatives that leverage the Hass branding and promotion, to build on new experiences with the green-skin, tropical avocado.

3. Period of Performance

The overall anticipated period of performance will be September 2018 to July 2019.

4. Scope Statement

IESC is seeking to engage a firm/consultant(s) to help Dominican green skin avocado exporters develop a pilot test market campaign for promoting cross-over consumption from Hass to green skin avocados.

5. Statement Of Work

5.1. Schedule of Authorities

The selected contractor/consultant(s) will report to the senior program manager and market linkages facilitator.

5.2. Responsibilities

The selected firm/consultant(s) is expected to undertake the following tasks:

Phase 1

Identify two to three retailers such as Publix, Whole Foods, Wegmans, Trader Joe's, with potential for participating in a promotional pilot program for green skin avocados in three potential market regions (West coast and Southeastern or Mid-Atlantic Coast). The firm's role would be to work with four to five DR exporters and their buyers identified by the Exporting Quality program; specifically, define role and responsibilities of successful market pilot, define market intelligence needed and solicit and determine other market information needed by exporters for their improved understanding and analysis of market opportunity.

Phase 2

For the PMA Fresh Produce summit due to take place in Orlando from October 18-20, 2018, review and make suggestions on existing marketing materials for use by the avocado exporters as well as recommend and design new additional materials. The DR delegation will be provided space at the Dominican Republic national stand and require basic promotional materials.

Phase 3

Meet with the group of green skinned avocado exporters and their current buyers/distributors participating in PMA to discuss further development of promotional materials and the branding strategy. The program may or may not hire an additional consultant directly to promote and organize meetings between the exporters and representatives of identified retailers to present the pilot program targeting selected East Coast or/and West Coast markets.

Phase 4

Building upon the PMA experience, help develop and build a brand name, logo, and tagline for sales materials by December 2018 for roll out at U.S. testing sites in early 2019. Design, complete, and analyze an in-store consumer sampling/acceptance testing or consumer interest test. Based on these results the marketing agency will work on a basic marketing plan to help retailers introduce the green skin avocados amongst their consumers. Implementation of the plan should not exceed six months. Strategic dates should be taken into consideration – January, when consumers make health-based resolutions, and February, when the US registers the highest consumption of avocado because of the Super Bowl.

Phase 5

Conduct assessment to measure the effectiveness of the pilot program and recommend next steps to keep expanding Dominican green skinned avocado market shares into upper level market segments in the US.

6. Deliverables

All deliverables should be provided in English; written deliverable should be provided in editable version. Deliverable dates are estimated.

Deliverable 1. September 10, 2018

Provide report on information needs, actors' role and responsibilities to carry out a successful market pilot. Define role and responsibilities of successful market pilot, define market intelligence needed, and solicit and determine other market information needed by exporters for their improved understanding and analysis of market opportunity. Report should be up to 5 pages, delivered via email and presented via skype video (up to 90 minutes) to IESC technical team and selected exporters.

Deliverable 2. September 15, 2018

Completed recommendations of existing marketing materials. Consultant should review and assess effectiveness of existing promotional materials used by exporters and the ones designed by Exporting Quality for the European market. Written feedback should be provided on text, graphics, colors, size, format, and overall content. Do the materials communicate clear messages, target the right customers, help motivate purchase decisions? Written feedback shall be in the form of mark ups on the material directly and summarized in a three-to-five-page, single-spaced report (font 11 or 12) that includes findings, recommendations for immediate changes, target audiences' recommendations. Approximate length of promotional materials is 2-to-3 pages. Anticipated number of exporters for which materials will be reviewed is 4. Report should be delivered via skype video (at the same time than Deliverable 1 is delivered), as well as submitted as a written document.

Deliverable 3. September 20, 2018

Draft of basic set of sales materials to be used by exporters in PMA. Based upon existing sales materials assessment, design a set of basic sales materials, possibilities include trifold brochures or one-page leaflets, and a banner for display at the Dominican Republic national stand (materials should not be company-specific but country-specific). New sales materials should back up the story, location and characteristics of Dominican avocados (as compared to Hass), it should include availability calendars, packaging options, etc. Consultants should also design a separate price template to be edited and used by each exporter. IESC technical team will provide oral (via Skype) and written feedback within 5 working days after having received the products. Consultant will provide final electronic version of materials at the latest 5 days after having received feedback from IESC technical team.

Deliverable 4. October 30, 2018

Preliminary Marketing Plan Outline. It will include but not be limited to the elements described in the "Marketing Plan" deliverable. Marketing plan should be built all throughout the assignment based upon the information gathered. Each section of the outline should include a summary with basic content information.

Deliverable 5. November 10, 2018

Design brand name, logo, tagline. Building upon the PMA experience, help develop and build a brand name, logo, and tagline for sales materials by December. It should be specific to the Dominican Republic and should back up the story, location and characteristics of Dominican avocados (as compared to Hass). Consultant should finalize at least three branding name, logo and tagline offerings to be reviewed by IESC and exporters involved in the pilot program. IESC technical team will provide oral (via Skype) and written feedback within 5 working days after having received the products. Consultant will provide editable final electronic version at the latest 15 days after having received feedback from IESC technical team.

Deliverable 6. November 30, 2018

Provide draft of consumer interest testing pilot design with suggested pilot sites, retailers and timeline for review and approval. Pilot should focus on 2 to 3 retailers in no more than 2 stores for each retailer (for an anticipated of 6 pilot sites). The consultant should present different promotional options (at least two options, more options are welcomed), with respective impact and estimated costs for each option. IESC technical team will decide on which and how many options to implement. IESC technical team will provide oral (via Skype) and written feedback within 5 working days after having received the different options. Consultant will provide final version of this deliverable at the latest 10 days after having received feedback from IESC technical team.

Deliverable 7. From January to May 2019

Implementation of consumer interest testing pilot. During implementation phase, consultant will collect data to provide an overall effectiveness assessment at the end of the pilot.

Deliverable 8. June 15, 2019

Provide assessment of the consumer interest testing pilot. Assessment will present effectiveness of the pilot and recommendation on way forward to promote green skin avocado consumption. Assessment will include information on price point, willingness to pay, flavor, use, knowledge of the origin, if it is a substitute product or a complementary

one. Report should be submitted as a written document (up to 15 pages) and presented via skype video.

Deliverable 9. July 2019

Marketing plan first draft. The basic marketing plan will include an Executive summary; a description of target customers (demographic, age, gender, psychographic characteristics and motivations); Unique Selling Proposition (USP) (how to distinguish green skin from Hass avocados and support a crossover/conversion process); pricing and positioning strategy (desired positioning related to Hass and how price will support conversion from Hass to the larger green skin avocado); distribution plan (how the new targeted markets will buy through current or new distributor network); recommended special offers (if any) to attract new customers; marketing materials; promotions strategy; conversion strategy; and basic financial projections. Report should be submitted as a written document (up to 30 pages) and presented via skype video.

7. Contract Type and Proposal Requirements

IESC is seeking proposals from both individual consultants and marketing firms. The proposal must address all deliverables and responsibilities and provide estimated budgets for each of the above-mentioned deliverables that can be used for developing **a fixed price deliverable contract**. Deliverable 6 has several options. The proposal should include the cost of each of the options.

Experience with fresh produce marketing program design is a requirement and a best value assessment will be used to award a contract.

8. Instructions to Offerors

8.1. Submission

- 1) Offers received after the closing date may not be considered.
- 2) Bids must be in US Dollars.
- 3) Technical and cost proposals must be submitted as two separate documents. Cost information must not be included in the technical proposal.

Offerors must submit their proposals by the closing date and time, as listed on page one, to the following: David Stein, Senior Program Associate, at dstein@iesc.org.

8.2. Clarification and Amendments

Offerors may request clarifications via email to dstein@iesc.org no later than **9:00 A.M., Eastern Standard Time (EST), on Wednesday, August 22, 2018**. IESC will provide answers to these questions and requests for clarification asked by all Offerors simultaneously via email and posted on the IESC website with the RFP before the close of

business on **Monday, August 27, 2018**. IESC may not answer questions before the proposal submission deadline outside of the allotted response period for clarifications. No questions will be answered over the phone or in person.

8.3. Cover Page and Markings

In addition to the required proposal documents listed in sections 10 and 11 below, please include a cover page with your submission for the technical and the cost proposals (separate cover pages). The cover page should be on company letterhead and should contain the following information:

- 1) Project or Title (from the front page of this RFP document)
- 2) Bid Reference Number (from the front page of this RFP document)
- 3) Company Name
- 4) Company Address
- 5) Name of Company's authorized representative
- 6) Contact person if different than Company's representative
- 7) Telephone #, Cellular/Mobile Phone #, Email address
- 8) Duration of Validity of proposal
- 9) Payment terms
- 10) DUNS # (Applies to companies, not to individuals)
- 11) Total Proposed Price (**cover page of cost proposal only**)
- 12) Signature, date, and time

9. Eligibility Requirements

Experience with fresh produce marketing program design is a must.

Bidders may be required to present a business license. Bidders may need to obtain a DUNS number and a vetting eligibility notice prior to receiving any award.

10. Basis for Award

IESC anticipates the award will be based on best-value principles. Accordingly, the award will be made to the technically acceptable Offeror whose proposal provides the greatest overall value to IESC and the Exporting Quality program, price and other factors considered, and whose proposals conform to all solicitation requirements.

To determine best value, proposals will be evaluated on the criteria below. The number of points assigned, totaling 100 points, indicates the relative importance of each individual criterion. Offerors should note that these criteria serve to: (a) identify the significant

factors which Offerors should address in their proposals, and (b) set the standard against which all proposals will be evaluated.

11. Technical Proposal Evaluation

Please read carefully, the following are instructions for preparing proposals. Proposals must be organized into sections corresponding to the sections presented in **11.1 Technical Evaluation Criteria**, and numbered accordingly. Please stay in the page limits given below. Only include the requested information and avoid submitting extra content. Any pages exceeding the page limitation for each section of the proposal may not be evaluated.

Proposals shall be written in English with each page numbered consecutively. Cover pages, dividers, and tables of contents are not subject to the page limit.

11.1. Technical Evaluation Criteria

Proposals will be evaluated according to the following criteria. Points will also reflect the overall presentation of the proposal, which should be clear, complete, well organized, and well written.

[1] Technical and management approach: 4-page limit; possible points 50

Proposals will be scored on the effectiveness of the proposal to meet the requirements of the program, as outlined in sections **5.2 Responsibilities**, and **6. Deliverables**.

[2] Offeror's past performance and references: 3 pg. limit (not including samples of previous work, which may be attachments); possible points 30

The proposal must provide a detailed account of the Offeror's record in implementing similar activities to those outlined in the tasks and activities. The technical proposal shall include a summary of past performance providing such services. Offerors should provide experience in general, and specifically include experience in the fresh produce marketing and retail industries.

This part should include sufficient information to demonstrate the Offeror's performance for the above tasks and activities and include the overall approach, including problem solving.

Offerors should provide a minimum of three (3) references for past and present projects for which the offeror has completed/is completing similar tasks. References must include contact information of the prior or current employers or clients. The list of references

must be submitted as an attachment and does not count within the page limitations of this section.

[3] Offeror's Personnel Experience and Capacities: 3 pg. limit (not including resumes or CVs, which are attachments); possible points 20

The technical proposal must include a description (biographical sketch acceptable) of the individual, or for companies a minimum of one, but not more than two, senior management personnel, who would directly work on the project and be engaged in the development, design, and implementation of the marketing program. Resumes or CVs must be submitted as attachments for individuals submitted in this section and do not count within the page limitations of this section.

This section will be marked on the extent to which the Offeror's or its personnel have experience in the fresh produce market and capacity to achieve deliverables as outlined in this RFP.

12. Cost Proposal Evaluation

The Offeror shall submit a separate page, including the project cost of performing the activities discussed in Section 5 of this RFP, and producing the deliverables listed in Section 6 of this RFP.

Offerors should budget for a fixed hourly rate with estimated number of hours plus estimated materials costs for each individual deliverable, based on time and expense estimates. The total cost should not include travel costs. However, the offerors should indicate the anticipated number of trips, sample travel itineraries and the number of personnel traveling during each trip.

All proposed costs must be in accordance with the U.S. Government Cost Principles under 2 CFR 200.

13. Deviations

IESC reserves the right to waive any deviations by offerors from the requirements of this solicitation that in IESC's opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition.

14. Discrepancies

Please read the instructions carefully before submitting your proposal. Any discrepancy in following the instructions or contract provisions may disqualify your proposal without recourse or an appeal for reconsideration at any stage.

15. Conflict of Interest Declaration

The following steps outline IESC's contract selection process and should be understood by all Offerors to ensure the transparency of awards and avoid conflict of interest.

- 1) Request for Proposals (RFPs) are posted on IESC's website. The offer is open to all qualified bidders;
- 2) Clarifications will be emailed to all bidders submitting questions, as well as posted on IESC's website, simultaneously;
- 3) Once the proposals are received, an evaluation committee scores them;
- 4) Cost proposals are evaluated for reasonableness, accuracy, and completeness;
- 5) The best value proposal is selected based on a combination of the technical score and the cost;
- 6) No activity can be started until both IESC and the awardee have signed a formal contract; and,
- 7) IESC policy against fraud and code of business ethics exists throughout the life of the subcontract and beyond. Even if the contract is closed, if any party is found guilty of fraud, IESC will make a full report to the USDA Office of Inspector General, which may choose to investigate and prosecute guilty parties to the fullest extent of the law.

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