



USAID
FROM THE AMERICAN PEOPLE

SUPPORT TO HAITI'S MICROFINANCE, SMALL AND MEDIUM ENTERPRISES SECTOR: BRANDING AND MARKING PLAN

November, 2007

This publication was produced for review by the United States Agency for International Development. It was prepared by Development Alternatives, Inc.

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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1. Introduction

Pursuant to the requirements defined in ADS 320.3.3. and in 22 C.F.R. 226.2, Development Alternatives, Inc. (DAI) hereby submits to USAID the Haiti's Support to Microfinance, Small, and Medium Enterprises Sectors project (Haiti MSME) branding and marking plan. This branding and marking plan is updated for submission with Haiti MSME's Year 2 workplan, and incorporates changes to USAID's branding and marking policies effective as of January, 2007. This branding and marking plan responds to the following questions:

- How will DAI acknowledge USAID's role in project funding and implementation?
- How and to what extent will DAI mark project activities, commodities, public communications, and other deliverables?
- How will DAI promote the program while communicating the message "USAID from the American People"?
- How will DAI communicate project activities and results to beneficiaries and cooperating country citizens?

In addition to complying with all of USAID branding guidelines, DAI will fully comply with the standards set forth by Section 508 of the Rehabilitation Act, which governs accessibility of electronic information to the disabled. DAI is committed to making all reports, documents, and presentations available to the public in full compliance with Section 508. DAI has developed the technical and institutional capabilities required to implement Section 508 requirements.

2. Branding – Implementation Plan

DAI fully commits itself to complying with USAID branding guidelines as outlined in the *Graphics Standards Manual*. DAI will brand all program activities to enhance the visibility and value of U.S. Foreign Assistance. We recognize that any activities under Haiti MSME are "From the American People" and not from DAI.

We will comply with USAID Branding guidelines in accordance with revised Automated Directive Systems (ADS) 320, (revision dated 1/08/2007). We will not create a separate project logo or identity. Under no circumstances will DAI try to recreate the USAID logo or brandmark. We will use the Standard Graphic Identity for USAID on all written materials, including brochures, newsletters, posters and reports as well as USAID color palette and typography. We also will use USAID graphic formats for PowerPoint presentations and other forms of public communications, (such as press releases and any other materials associated with press conferences or media interviews), in order to ensure that the United States Government is visibly acknowledged for its contributions and funding.

In cases of co-sponsorship, DAI will "co-brand" with host-country counterparts and other donors in manner providing equal acknowledgement to co-sponsor(s).

DAI will ensure that all subcontractors on Haiti MSME comply with USAID branding guidelines, when completing USAID-funded work on this project.

Grants Under Contract

The Haiti MSME program includes the implementation of a \$1.2 million grant fund, the Product Innovation Fund, (PIF). Where possible and appropriate, DAI and PIF subgrantees will communicate the message that the PIF is “From the American People” and, by increasing access to finance, intends to stimulate economic growth in Haiti and improve livelihoods among Haitian citizens.

USAID/Haiti intends to grant a blanket waiver to all PIF grantees waiving the requirement that they comply with all USAID branding and marking requirements. Under ADS 320, exception (f) allows for exemption of subgrantees in cases where branding and marking could “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”. USAID/Haiti and Haiti MSME determined that it is most appropriate to apply a blanket waiver to all PIF beneficiaries, because ADS 300 exception (f) applies to all potential/eligible PIF activities.

However, in cases where USAID branding and marking do not “deter achievement of program goals”, subgrantees will follow USAID branding guidelines as outlined in the *Graphics Standards Manual* and will comply with ADS 320.3.3. and 22 C.F.R. 226.2. DAI will require that all subgrantees submit a branding and marking plan where they describe which modes of communication they plan to use, and those that will include branding and marking (with the understanding that, per the blanket waiver, they are not required to comply in all areas). Communications that are visible to direct beneficiaries, (especially to financial institutions’ clientele), are not expected include USAID branding and making (as a client who perceives donor-funding behind a financial institution is often less inclined to repay a loan). However, other kinds of communications can and should include USAID branding and marking to acknowledge USAID’s role, where possible and appropriate.

The following table details in which cases subgrantees will not be expected to follow USAID branding guidelines:

| Communications Tool | USAID Branding Required? | Rationale |
|--|--------------------------|--|
| Logo | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees may utilize their own logo. |
| Visual Identity (colors, font, style, etc) | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees may utilize their own visual identity. |

Business Cards and Stationery

DAI is aware that, as a USAID contractor, we must seek approval from USAID before printing business cards or stationary. DAI will comply with the following clauses in regards to business cars and stationary/letterhead:

320.3.1.6 Business Cards: It is USAID policy to prohibit the use of the USAID Identity on contractor and recipient business cards.

320.3.1.5 Administrative Communications: USAID contractors and recipients must not use the USAID Identity on any communications that are strictly administrative, rather than programmatic, in nature.

The business cards developed by DAI for project employees comply with these guidelines, and do not include the USAID logo. No employee on Haiti MSME will claim to be a USAID employee or a member of the United States Government or Diplomatic Mission.

DAI will not use USAID letterhead to communicate on administrative issues such as renting facilities, hiring/firing staff, and communicating with cooperating governmental organizations on contractor compliance issues (local tax questions, etc.)

Non-USAID Authored, Edited, or Reviewed Publications

All project publications—including reports, studies, and papers—funded by USAID will follow the brand standards outlined in the *Graphic Standards Manual*. These publications authored by non-USAID employees will include the following statement on the cover at the bottom of the page:

<DATE>

This publication was produced for review by the United States Agency for International Development. It was prepared by <list authors and/or organizations involved in the preparation of the report.>

On the title page, DAI will include the following disclaimer:

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

Studies, reports, publications, websites, and all informational and promotional products that are *not* authored, reviewed, or edited by USAID will contain the following provision:

This study, report, publication (specify) is made possible by the support of the American people through the United States Agency for International Development (USAID). The contents of this study, report, publication (specify), are the sole responsibility of (name and organization) and do not necessarily reflect the views of USAID or the United States Government.

3. Marking – Implementation Plan

There are two components to a marking plan: 1) the type of marking selected and 2) the extent to which activities, commodities, public communications, and project deliverables are marked.

Under Haiti MSME, DAI will mark all commodities, non-expendable equipment (including computers and vehicles), signage, event materials, project signs and plaques, website, and program materials with USAID’s Standard Graphic Identity.

DAI will mark all expendable equipment with adhesive labels containing the Standard Graphic Identity. Per USAID/Haiti and US Embassy security recommendations, DAI will not mark project vehicles.

DAI will mark all project publications—including reports, studies, and papers—funded by USAID following the standards outlined in the *Graphic Standards Manual*. All other project communications, (including website, training materials, folders, newsletters, banners, brochures, etc), will prominently display the USAID logo and “From the American People” message. Additionally, any radio or audio announcement will include an audio tag such as “made possible by USAID, From the American People”. All events financed by USAID will prominently display the USAID logo (trainings, conferences, launches, workshops).

Grants Under Contract

As stated above in Section 2 – USAID/Haiti intends to grant a blanket waiver to all PIF grantees waiving the requirement that they comply with all USAID branding and marking requirements. Under ADS 320, exception (f) allows for exemption of subgrantees in cases where branding and marking could “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”. USAID/Haiti and Haiti MSME determined that it is most appropriate to apply a blanket waiver to all PIF beneficiaries, because ADS 300 exception (f) applies to all potential/eligible PIF activities.

However, in cases where USAID branding and marking do not “deter achievement of program goals”, subgrantees will follow USAID branding guidelines as outlined in the *Graphics Standards Manual* and will comply with ADS 320.3.3. and 22 C.F.R. 226.2. DAI will require that all subgrantees submit a branding and marking plan where they describe which modes of communication they plan to use, and those that will include branding and marking (with the understanding that, per the blanket waiver, they are not required to comply in all areas). Communications that are visible to direct beneficiaries, (especially to financial institutions’ clientele), are not expected include USAID branding and making (as a client who perceives donor-funding behind a financial institution is often less inclined to repay a

loan). However, other kinds of communications can and should include USAID branding and marking to acknowledge USAID’s role, where possible and appropriate.

The following table details in which cases subgrantees will not be expected to follow USAID marking guidelines:

| Communications Tool | USAID Marking Required? | Rationale |
|--|--------------------------------|---|
| Commodities, non-expendable equipment, (computers, vehicles, etc), event materials, signs and plaques. | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees are not required to mark commodities, materials, signs of plaques with USAID’s standard graphic identity. |
| Expendable Equipment | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees are not required to mark expendable equipment with USAID’s standard graphic identity. |
| Publications (reports, studies, papers), website, training materials, folders, newsletters, banners, brochures, pamphlets. | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees are not required to mark publications with USAID’s standard graphic identity. |
| Events (trainings, conferences, launches, workshops). | No | Per ADS 320, exception (f) where branding and marking may “deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans”, subgrantees are not required to display USAID’s standard graphic identity at events. |

4. Promoting Activities and Communicating Project Results

To promote project activities and communicate project results to beneficiaries, Haitian citizens, USAID counterparts, and donors, DAI has devised a knowledge management and communications strategy, which will be implemented in coordination with USAID. This strategy will include a quarterly newsletter and project website (to be launched in Year Two), the regular publication of technical notes and success stories, and the continued implementation of the Haiti MSME performance monitoring system. The

Capacity Building and Impact Coordinator, with input from other members of the Haiti MSME project team, will oversee and coordinate this communications strategy.

Key Milestones and Project Events

Haiti MSME will promote project activities and milestones through various events. This includes the launch of the Product Innovation Fund with press coverage and diplomatic attendees, the “Innovations in Finance” lecture series, as well as numerous trainings and conferences. Haiti MSME will widely publicize its market information activities and findings through the launch of GIS mapping to the financial sector, and the publication of a guide to Haiti’s financial institutions (“the Blue Book”). Haiti MSME will use all project events to communicate project successes and to promote the “From the American People” message to diverse audiences.

Quarterly Newsletter

The project will publish a quarterly newsletter to share information on 1) the project’s activities and news; 2) upcoming international and national events and publications; 3) and innovations and challenges faced by local practitioners. Members of the micro, small, and medium enterprises community will be encouraged to contribute to the newsletter. This newsletter will be published in both English and French.

Project Website

DAI will create a website for Haiti MSME as a way to share information about the project’s activities and results with the Haitian community and interested parties worldwide. This website will contain the Product Innovation Fund Request for Proposals and application forms; information on upcoming events sponsored by the project and others; key industry indicators; electronic versions of the monthly newsletters and other industry-level reports; project success stories; and photographs that visually represent project impact on USAID beneficiaries. The Haiti MSME project website will be hosted on USAID MicroLinks site and will link to ANIMH’s website.

Technical Notes

To better document and disseminate innovations, best practices, and lessons learned in Haiti, the project will create a series of technical notes on issues pertinent to the micro, small, and medium enterprises sectors, such as value chain analysis, market research and new product development, rural and agricultural finance, microfinance and HIV/AIDS. To provide technical notes to a wider audience, they will be posted to the website.

Success Stories

Following the MicroLinks format of Notes from the Field, Haiti MSME staff and partner institutions will be encouraged to write Haiti MSME Success Stories, briefly summarizing an experience, lesson learned, or project success. The Success Stories will provide a dissemination avenue of project results in an easy-to-read format.

Annual Presentations to Core Partners

Haiti MSME will deliver annual presentations to its core partners, (as of year two of the project, this includes 19 credit unions supported through a subcontract to Development International Desjardins, 6 non-cooperative microfinance institutions, and any institutions to receive funds through Haiti MSME's Product Innovation Fund). The presentations will inform partners of the assistance delivered to the sector, as well as planned interventions for the coming year, such that all partners are aware of Haiti MSME activities and results, even those that may not involve them directly.

Meetings with USAID program beneficiaries

The formal working group between Haiti MSME and other USAID projects (KATA, MYAP, IDEJEN, DEED, and Marché) – will facilitate Haiti MSME's access to other USAID project beneficiaries. Haiti MSME will communicate information to these beneficiaries on project activities and results through both formal and informal meetings and contact.

Meetings with credit unions and Product Innovation Fund grantees

Haiti MSME will conduct site visits to credit unions supported through the Development International Desjardins subcontract and to Product Innovation Fund grantees. On all such occasions, Haiti MSME will identify opportunities to market USAID at the client and beneficiary level and to share information on project activities and results.

Press Releases

Haiti MSME will produce regular press releases to inform the press (through USAID's Press Office) of project events.

Performance Monitoring System

The performance monitoring system is the foundation of the project's communications strategy. This system will be used to compile and track performance monitoring information, including indicators required by USAID and Congress (such as the Microenterprise Results Reporting). This system is also used to capture qualitative information, such as anecdotal experiences, which could be published as Success Stories. DAI will work closely with USAID to determine and define the performance indicators. The performance monitoring system is discussed in greater detail in the Performance Monitoring Plan, updated for Year Two and included with the Haiti MSME's Year Two Work Plan.