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Branding and Marking in USAID Acquisition & Assistance Awards



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Why Do We Brand?

- Section 641 of the Foreign Assistance Act of 1961 requires foreign assistance to be communicated to host country audiences as “American Aid.”
- National Security Strategy identifies U.S. development along with diplomacy and defense as one of the three pillars to American national security.
- USAID development assistance, implemented by its partners, needs to be communicated to the Palestinians to create awareness and positive attitudes. The “good story” needs to be told through:
 - **correct use of branding and marking**
 - **effective media and public outreach methods**



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What is Branding?

Branding refers to how a program or project is named and positioned, and who it is from.

It identifies the sponsor of the work.

What is Marking?

Marking refers to applying USAID and partner graphic identities and logos to program materials or project signage to visibly acknowledge contributors.

It identifies organizations supporting the work.



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Branding and Marking in USAID Acquisition



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Acquisition

ADS 320 effective for all contracts awarded since January 10, 2007, or ongoing contracts that are substantially amended after January 10, 2007.

- New guidelines for contractors state that the USAID identity will appear only on program communications.
- Contractors must not use USAID logo on communications, materials or equipment that are strictly administrative.



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الوحدة العائلية للري بالتنقيط-طوباس



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من الشعب الأمريكي

تم تنفيذ هذا المشروع من خلال الوكالة الأمريكية للتنمية الدولية (USAID) بتمويل من الشعب الأمريكي لمنفعة الشعب الفلسطيني



كانون ثاني- 2007

الوكالة الأمريكية للتنمية الدولية

تخريج فوج ٢٠٠٧ - مدرسة الأوائل

برنامج البناء والتوظيف الفلسطيني



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هذا المشروع هو بدعم من الوكالة الأمريكية للتنمية الدولية (USAID) وهو بتمويل من الشعب الأمريكي للمساهمة في بناء نظام تعليمي متين



الوكالة الأمريكية للتنمية الدولية



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Acquisition

No USAID identity (logo) on administrative communications, materials or equipment, such as:

- Contractor business cards (but they may include wording “USAID Contractor”)
- Communications related to award administration, such as employment ads and renting office space or equipment
- Contractor vehicles
- Offices and office supplies
- Letterhead, when used for administrative purposes



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Acquisition

Communications and equipment used for both administrative and programmatic purposes:

- USAID identity is required, but no contractor logo allowed.
- For instance, letterhead or computers used for both administrative and program communications will have USAID logo only.



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Acquisition

USAID Branding in Acquisition

- USAID receives ***exclusive*** branding on all activities or products under an acquisition award.
- Contractors must use USAID Identity as provided, must follow guidance laid-out in the USAID Graphic Standards Manual, no contractor logos or identities allowed. (Links provided).
- In Arabic language communications, such as documents, banners, web sites, project signs, use USAID logo in Arabic.





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Acquisition

All USAID funded programs and public communications will be marked by USAID identity. The marking requirements flow down from direct contracts to subcontracts.

Exclusive USAID marking applies to:

- Projects (e.g. by project signs)
- Publications (press releases, studies, surveys, etc.)
- Banners
- Web sites
- Public Service Announcements (PSAs)
- Events (e.g. a banner)
- Training sites
- Commodities
- Other USAID funded activities



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Acquisition

No graphic identities (project logos) should be created for new projects.

- The project can be called by its name, but no special logos should be created for the funded project.
- The regulations apply also to contracts awarded prior to January 10, 2007.



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Acquisition

Contractors submit Branding Implementation Plan (BIP) and Marking Plan (MP) as a response to USAID's Branding Strategy

Branding Implementation Plan outlines how the USAID funded program will be promoted to the public.

BIP includes:

- How to incorporate the message “This Assistance Is from the American People.”
- How to publicize the program, e.g. through press releases, radio interviews, web site.
- Key milestones to be highlighted and publicized: launching the program, announce research findings, publish reports, project completion.



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Acquisition

Marking Plan (MP)

Identifies the specific programs, projects, activities, public communications, or commodities that are visibly marked with the USAID identity.

Contractors and subcontractor: no contractor logo permitted

Marking requirements include:

- commodities and equipment
- program, project or activity sites
- public communications, such as publications, reports, success stories, press releases
- Audio, visual, or electronic public communications
- Events, such as training courses, seminars, press events



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Branding and Marking in USAID Assistance



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USAID Branding in Assistance

- All assistance awards effective after January 2, 2006 or ongoing awards that are amended after January 2, 2006.
- USAID & implementing partner ***both receive equal branding*** on all activities or products under an assistance award.
- Recipient must co-brand USAID Identity as provided, must follow guidance laid-out in the Partner Co-Branding Guide, when issued.



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Assistance

Programs, projects, activities, public communications, or commodities under USAID grant or cooperative agreement are co-branded and co-marked

إعادة تأهيل المدرسة الثانوية-طوباس

تم تمويل هذا المشروع بدعم من الشعب الأمريكي لمنفعة الشعب الفلسطيني.
ينفذ المشروع من قبل خدمات الاغاثة الكاثوليكية بتمويل من الوكالة الامريكية للتنمية الدولية (USAID)

كانون ثاني- 2007


USAID
من الشعب الأمريكي


CATHOLIC RELIEF SERVICES

الوكالة الامريكية للتنمية الدولية

توسيع الخدمات الصحية المميزة للمرأة الفلسطينية وطفلها بيت لحم

تم تمويل هذا المشروع بدعم من الشعب الأمريكي لمنفعة الشعب الفلسطيني.
ينفذ المشروع من قبل مستشفى العائلة المقدسة-بيت لحم بتمويل من الوكالة الامريكية للتنمية الدولية (USAID)

كانون ثاني- 2007


USAID
من الشعب الأمريكي



الوكالة الامريكية للتنمية الدولية



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Assistance

Co-branding and Co-marking

- Co-branding and co-marking mean that the program name represents both USAID and the implementing partner. The identity (logos) of USAID and its partner must be visible and with equal size.
- Program materials include: letterhead for program purposes, surveys, studies, banners, public service announcements, etc.
- The same regulations apply to grants under USAID contracts (GUCs).
- USAID may request a larger logo than the partner logo, if USAID is the major donor or considers the activity extremely important.



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Assistance

Recipient must not use USAID identity on:

- Administrative documents, such as business cards and letterhead for administrative purposes only. Business cards may use “USAID Grantee.”
- Other award administration activities, such as office rental, employment ads, equipment rental.
- Vehicles
- BUT USAID identity is required, if the items are used for both programmatic and administrative purposes.



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Assistance

The apparently successful applicants submit a Branding Strategy and a Marking Plan.

They identify how to incorporate the USAID and recipient logos, and the specific activities, public communications, or commodities that will be used to publicize the program.

Marking requirements include:

- commodities and equipment
- program, project or activity sites
- public communications, such as publications, reports, success stories, press releases, etc.
- Audio, visual, or electronic public communications
- Events, such as training courses, seminars, press events



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Branding and Marking in USAID Acquisition & Assistance Awards



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Branding and Marking in USAID Acquisition

Effective Date: January 10, 2007

Applies to all new and ongoing acquisition awards that are substantially amended after January 10, 2007.



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USAID Branding and Marking in Acquisition

Pre-award Procedures (ADS 320.3.1.2 & ADS 320.3.2.1):

1. USAID Strategic Objective Team prepares a Branding Strategy for inclusion in the RFP/RFTOP solicitation.
2. Offeror proposes a Marking Plan (MP) and a Branding Implementation Plan (BIP). The BIP should respond to the Branding Strategy developed in the solicitation.
3. The BIP and MP must be incorporated in the Offeror's proposal and must include BIP and MP for sub-contractors and sub-awardees.



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USAID Branding and Marking in Acquisition

Pre-award Procedures (ADS 320.3.1.2 & ADS 320.3.2.1):

- Branding Implementation Plan (BIP) and Marking plan (MP) will not be competitively evaluated and will not be the deciding factor in the award.
- Failure to submit or negotiate an adequate BIP and/or MP within the time specified by the Contracting Officer will make the apparent successful Offeror ineligible for the award.
- The BIP and MP will be reviewed for responsiveness to the Branding Strategy, negotiated and approved by USAID.
- USAID and Offeror come to terms on the proposed BIP and MP. These will be incorporated in the resulting award.



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USAID Branding and Marking in Acquisition

Post-award Administration (ADS 320.3.1.3):

- Immediately after award, the CO must brief the selected contractor on USAID's monitoring and enforcement of the agency's branding and marking requirements.
- After award, CTOs serve as the USAID point of contact for reviewing materials and answering questions from implementing partners.
- The CTO is responsible for making sure that the contractor complies with the BIP and MP as incorporated in the contract.



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USAID Branding and Marking in Acquisition

Post-award Administration (ADS 320.3.1.3):

- Contract deliverables must follow the guidance as specified in the “Graphic Standards Manual”.
- Failure to comply with the MP and/or the BIP requirements may result in corrective actions undertaken by the Contracting Officer.
- Additional costs associated with Marking and Branding requirements will be approved by USAID if reasonable, allowable and allocable in accordance with the applicable Cost Principles.



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USAID Branding and Marking in Acquisition

Post-award Administration (ADS 320.3.1.3):

- Grants awarded under contracts (GUCs) follow assistance rules (i.e. must be marked and branded as grants).
- The Branding and Marking requirements are subject to audit by the USAID Inspector General (IG).
- Monitoring Compliance: The CTO is responsible for monitoring the contractor's compliance with the BIP and MP in accordance with the relevant provisions under the contract.
- The CTO takes action when a waiver or a modification to the MP are requested.



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Branding and Marking in USAID Assistance

Effective Date: January 2, 2006

Applies to all new and ongoing assistance awards that are amended after January 2, 2006.



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USAID Branding and Marking in Assistance

Pre-award Procedures (22 CFR 226.91 and ADS 320.3.3)

- **Applicability:** Recipients must co-brand and co-mark USAID funded program materials used for program implementation in accordance with the “Partner Co-Branding Guide” once issued.
- USAID Branding and Marking requirements do not apply to Public International Organizations (PIOs), unless USAID is the sole donor funding a specific program or activity of a PIO.
- Apparently Successful Applicant submits Branding Strategy (BS) and Marking Plan (MP) for USAID’s review and approval.



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USAID Branding and Marking in Assistance

Pre-award Procedures (22 CFR 226.91)

- The BS and MP will not be competitively evaluated but will be included in the final award once negotiated and agreed upon.
- Branding Strategies and Marking Plans should be unique and responsive to the specific circumstances, implementation challenges and working environments under each specific award.
- Marking Plans should be comprehensive and include specific deliverables and performance requirements.



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USAID Branding and Marking in Assistance

Pre-award Procedures (22 CFR 226.91 and ADS 320.3.3)

- Estimated costs associated with Branding and Marking requirements must be included in the Total Estimated Cost of the application.
- Failure to submit or negotiate a marking plan and/or a branding strategy within the time specified by the Agreement Officer will make the Apparently Successful Applicant ineligible for award.



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USAID Branding and Marking in Assistance

Post-award Procedures (ADS 320.3.3 & CFR 226.91)

- The Activity Manager or CTO serves as USAID's point of contact for reviewing materials for compliance and answering questions.
- CTOs are responsible for monitoring the Branding and Marking requirements in accordance with the approved BS and MP.
- Marking and branding requirements under assistance awards “flow down” to sub-recipients of sub-awards.



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USAID Branding and Marking in Assistance

Post-award Administration (ADS 320.3.3 & CFR 226.91)

- Where grantees fail to comply with the agreed upon Marking Plan and/or Branding Strategy, the Agreement Officer will initiate corrective actions.
- Additional costs associated with Marking and Branding requirements will be approved by USAID if the costs are determined to be reasonable, allowable and allocable in accordance with the Cost Principles under OMB Circular A-122.
- The branding and marking provisions are subject to audit by the USAID Inspector General (IG).



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Exceptions & Waivers in Acquisition and Assistance Awards

Exceptions:

- a. Are programmatic, not circumstantial, in nature and are usually approved prior to the award process in response to adverse circumstances that affect implementation.
- b. For specific cases for granting an exception for marking requirements under acquisition awards, please refer to ADS 320.3.2.5.



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Exceptions & Waivers in Acquisition and Assistance Awards

- c. For specific cases for granting an exception for marking requirements under assistance awards, please refer to 22 CFR 226.91(h).
- d. Exceptions are presumptive, not automatic and must be approved by the Agreement and Contracting Officer.
- e. Exceptions cannot be approved retroactively; they must be approved in advance.



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Exceptions & Waivers in Acquisition and Assistance Awards

- f. The CO's/AO's determination that an exception does not apply is not subject to a separate appeal process but may be handled through normal assistance award administration procedures.
- g. Approved exceptions for USAID's Marking requirements "flow down" to sub-awards unless specified otherwise.



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Exceptions & Waivers in Acquisition and Assistance Awards

Waivers:

- a. Are circumstantial, not programmatic and may be approved by the USAID Mission Director (MD) in response to adverse circumstances that affect implementation.

- b. No Marking is required while a waiver determination is pending.



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Exceptions & Waivers in Acquisition and Assistance Awards

- c. Only the CO/AO has the authority to inform the contractor/recipient of a waiver decision and to modify the award terms and conditions.
- d. Approved waivers are not limited in duration, but are subject to the Mission Director's review at any time due to changed circumstances.
- e. Approved waivers for USAID's Marking requirements "flow down" to sub-awards unless specified otherwise.



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Exceptions & Waivers in Acquisition and Assistance Awards

- f. If the circumstances on which the waiver was based change, the Mission Director may rescind the waiver even when the activities are completed, but before close-out of the award. In that case, the marking requirements approved in the Marking Plan apply from the date forward that the waiver is rescinded.



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