QCTO
Quality Council for Trades & Occupations

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TERMS OF REFERENCE: CORPORATE IDENTITY (CI) GUIDE REFRESH FOR QCTO

1. Introduction

This document outlines the scope of work for refreshing the Quality Council for Trades & Occupations (QCTO) Corporate Identity (CI) Guide. The purpose of this refresh is to modernise and enhance the QCTO brand's visual and textual representation across all communication channels, ensuring consistency, relevance, and alignment with the organisation's current strategic objectives and future aspirations.

The existing QCTO CI Manual (2016) serves as the foundational document, and this refresh seeks to build upon its strengths while addressing contemporary design standards, digital application requirements, and evolving communication needs.

2. Project Objectives

The primary objectives of this CI Guide Refresh are to:

a) Modernise the overall visual aesthetic of the QCTO brand while retaining its essence and recognition.
b) Ensure consistency in brand application across all online and offline platforms.
c) Provide clear, comprehensive, and updated guidelines for all brand elements.
d) Adapt the CI for digital-first applications and modern communication channels.
e) Streamline brand implementation for both internal and external stakeholders.

3. Scope of Work

The scope of work for the Corporate Identity Guide Refresh includes, but is not limited to, the following key areas:

3.1. Brand Audit and Analysis
a) Review of the existing QCTO CI Manual (2016) to identify strengths, weaknesses, inconsistencies, and areas for improvement.
b) Analysis of the current QCTO website (www.qcto.org.za) and other digital presence to assess brand application and identify gaps.
c) Benchmarking against leading similar organisations' corporate identities (optional, if deemed necessary by QCTO).
d) Stakeholder interviews/workshops to gather insights on current brand perception and desired future direction (to be defined and scheduled by QCTO).

3.2. Logo and Core Identity Elements Refresh

3.2.1. *Logo:*
   a) Evaluation of the existing QCTO logo (icon, text, payoff line) for timelessness, versatility, and digital adaptability.
   b) Refinement or subtle evolution of the logo if necessary, ensuring it remains recognisable and aligns with the "hand and head" concept and the "deep red" primary colour. Any proposed changes must be clearly articulated and justified.
   c) Development of updated logo usage guidelines, including clear space, minimum size, colour variations (CMYK, Pantone, RGB, Hex), and incorrect usage examples for all applications.
   d) Specific guidelines for the "Sub Brand 'Q'" usage, including outline, solid colour, and image-filled variations for both print and digital.
   e) Specific guidelines for co-branding arrangements with other quality councils, including SAQA and professional bodies, Accredited Skills Development Providers (SDPs), and the Department of Higher Education and Training (DHET).

3.2.2. Corporate Colours:
   a) Verification and potential update of primary, secondary, and accent colour palettes, including precise colour values for print (CMYK, Pantone) and digital (RGB, Hex).
   b) Guidelines for colour combinations and accessibility considerations.

3.2.3. Corporate Typefaces:
   a) Review of primary (Myriad Roman/Bold, Whitney Semibold/Medium) and secondary (Arial Plain/Bold) typefaces.
   b) Recommendation of modern, versatile, and web-safe typefaces if required, ensuring legibility and brand personality.
   c) Clear guidelines for typeface usage across all applications (headings, subheadings, body text, captions) with specified weights, sizes, and leading.

3.3. Stationery and Marketing Collateral Refresh

3.3.1. Updated Designs and Guidelines for:
   a) Letterhead and Letter Formatting (A4)
   b) Memorandum and Formatting (A5)
   c) Business Cards (Front and Back, 90mm x 50mm)
   d) Compliment Slips (DL)
   e) Name Cards (90mm x 50mm, 90mm x 100mm)
   f) Visitor Cards (90mm x 50mm)
   g) Document Covers (A4, including die-cut window variations)
   h) Folders (A4 with gusset and business card slits, including grey and red background variations)
   i) CD Inserts and Printed CDs
   j) Leaflets (A4 fold to DL, various design examples)
   k) Brochures (A4 fold to A5, various design examples, including ISBN placement)
   l) Plastic Sleeves

3.3.2. Specification Updates:
   a) Refreshed paper stock specifications, weights, and finishes.

b) Detailed print specifications for all collateral.

3.4. Digital and Electronic Media Guidelines

3.4.1. Website:
a) Comprehensive guidelines for QCTO's website, covering header, navigation, typography, image usage, button styles, form elements, and overall UI/UX considerations to ensure a consistent brand experience.
b) Emphasis on responsive design principles for optimal viewing on desktop, tablet, and mobile devices.

3.4.2. Email Signature:
a) Updated and optimised email signature guidelines for consistent professional communication.

3.4.3. PowerPoint Presentations:
b) Refreshed templates and guidelines for all types of PowerPoint slides (title slides, text slides, chart slides) to ensure consistent branding and visual appeal.

3.4.4. Social media:
a) Guidelines for profile images, cover photos, and content posting on relevant social media platforms (if applicable to QCTO's Social Media policy).

3.4.5. Digital Banners/Advertisements:
a) Guidelines for digital display advertising, ensuring brand consistency in online campaigns.

3.5. Imagery Guidelines

a) Refined photographic style guidelines, including subject matter, composition, lighting, and colour treatment (e.g., preference for images with red tones, industry-relevant action shots).
b) Guidance on the appropriate use of black and white vs. colour photography.
c) Recommendations for image sources or photography style to maintain consistency.

3.6. Promotional Elements Guidelines

a) Updated guidelines for branding various promotional items (pens, mugs, sports water bottles, USBs, notebooks, lanyards, clothing – golf shirts, t-shirts, casual shirts).
b) Detailed specifications for branding methods (pad printing, foiling, debossing, embroidery, laser engraving).
c) Guidelines for banner walls, roll-up banners, telescopic/feather banners, and exhibition stands, ensuring consistent application of logos, imagery, and messaging.

3.7. Brand Governance and Implementation

3.7.1. Updated Brand Asset Library:
a) Provision of all refreshed brand assets (logos in various formats, colour palettes, fonts) in easily accessible digital formats.

3.7.2. Usage Examples and Misuse Cases:
a) Clear examples of correct and incorrect brand application to prevent dilution and ensure consistency.

3.7.3. Version Control:
a) Establishment of a clear version control system for the CI Guide.

4. Deliverables

The successful service provider will deliver the following:

a) A comprehensive, modernised QCTO Corporate Identity Guide document (digital PDF and editable source files).
b) All refreshed brand assets (logo files in vector and raster formats, font files, colour swatches).
c) Updated templates for key stationery, communication, and digital elements (e.g., MS Word letterhead, PowerPoint template).

5. Envisaged Project Timeline and Reporting

5.1. Kick-off Meeting:
a) To align on project understanding, confirm stakeholders, and establish communication protocols.

5.2. Interim Reviews:
a) Scheduled review points for QCTO feedback and approval at key stages (e.g., Brand Audit findings, Logo concepts, Stationery designs, Digital guidelines).

5.3. Final Delivery:
a) Submission of all final deliverables as outlined in Section 4.

5.4. Reporting:
a) Regular progress reports (frequency to be agreed upon).

6. Project Management and Collaboration

The service provider will be expected to:

a) Assign a dedicated project manager and team.
b) Maintain open and regular communication with the QCTO project lead.
c) Be responsive to feedback and iterative changes.
d) Provide all necessary design files and technical specifications.

7. Assumptions and Exclusions

7.1. Assumptions
a) QCTO will provide timely feedback and approvals at each project stage.
a) QCTO will provide access to any necessary existing brand assets and relevant internal documentation.
b) All content (text, imagery for specific collateral like brochures, leaflets) will be provided by QCTO, unless otherwise specified.
c) The scope does **not** include redeveloping the QCTO website, but providing guidelines for its refreshed branding.

7.2. Exclusions
a) Content creation (e.g., copywriting for brochures, photography shoots).
b) Printing of any collateral.

      c) Development or implementation of any digital platforms (e.g., new website, social media management).
      d) Marketing strategy development.
      e) Any items not explicitly mentioned in Section 3.

8. Service Provider Requirements
      a) Service providers should submit proposals that clearly outline their approach to this CI refresh, including relevant experience, team capabilities, proposed timeline, and a detailed cost breakdown.
      b) Proposals should demonstrate a strong understanding of modern branding principles, digital design trends, and the ability to maintain brand recognition during a refresh.

9. Expected timeline for delivery
      a) All three deliverables listed in section 4 must be delivered within a maximum of four (04) months from the date of the project kick-off meeting after acceptance of the Purchase Order by the appointed service provider.
      b) The project kick-off meeting must take place within two weeks of acceptance of the Purchase Order.

10. Evaluation Criteria

1. **QUALITY OF PRIOR WORK ON THE DEVELOPMENT OF CORPORATE IDENTITY (CI) MANUALS.**	Quality Rating scoring rubric
The score shall be based on up to a maximum of four references of prior work forming a portfolio of evidence. Each reference must have an aligned high-resolution (sufficient for evaluation of the quality of work done) sample of the CI manual of no more than five (05) pages in length. The QCTO shall not share the bidders' submissions with any entity or person outside the evaluation of this RFQ. The QCTO shall observe the confidentiality of the samples provided. The reference letter must be on a client company letterhead, with a date, client signature, and clearly stating the client's level of satisfaction with the work done. **NO Appointment letters/emails will be accepted in place of reference letters.** **All prior work done must be no more than eight (08) years old.**	*Poor (Score 05)*: The Quality of the sample CI manual is unlikely to satisfy project objectives or requirements. *Good (Score 08)*: The Quality of the CI manual is specifically good enough to meet the requirements and standards of the QCTO. *Excellent (Score 15)*: In addition to meeting the "good" rating, the quality of the CI manual innovatively and efficiently captures the essence of the brand, indicating that the service provider possesses outstanding knowledge of the deliverables. The Quality of the CI manual details ways to improve the project outcomes and the quality of the outputs.

Reference number 1	Quality rating:
Reference number 2	Quality rating:
Reference number 3	Quality rating:
Reference number 4	Quality rating:
 	
2. TEAM MEMBERS' QUALIFICATIONS AND EXPERIENCE CVs must be in the supplied QCTO format, as attached to this RFQ.	
a) Lead Brand Strategist A CV showing at least ten (10) years of progressive experience in brand strategy Minimum qualifications: Diploma in Advertising, Marketing, Communications or a related field.	10 points maximum
b) Assistant Brand strategist A CV showing at least five (05) years of relevant experience in brand strategy. Minimum qualifications: Minimum qualifications: Diploma in Advertising, Marketing, Communications or a related field.	Maximum 6 points
c) Graphic Designer Minimum qualifications: Any Diploma of higher **and** a CV that shows experience of at least five (05) years in graphic design Proficiency in relevant graphic design software is a good indicator of capacity.	Maximum 6 points

d) **Digital Marketing/quality assurance**
 	
    Specialist:
        A CV showing at least three (03) years in quality assurance in digital marketing using SEO or related techniques.
 	
Minimum qualifications
NQF Level in Marketing/Information Science/Management or a relevant field.
	Maximum 6 points

Supported by relevant certifications in analytics/search engine optimisation (SEO)/digital marketing or similar.	
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3. PROJECT PLAN AND RISK MANAGEMENT APPROACH **A maximum of 12 points for this criterion shall be awarded.**	
Zero (0) points for non-submission of a project plan and risk management approach	
Poor (Score 03) The project plan is poor or is unlikely to satisfy project objectives or requirements. The project plan lacks adequate detail and fails to account for the full scope of the project and associated risks. The project plan also indicates unrealistic or unacceptable timelines.	
Good (Score 08) The project plan has been specifically tailored to address all scope of work objectives and requirements. There is an adequate degree of detail that facilitates understanding of the proposed scope of work and the associated risks.	
Excellent (Score 12) Besides meeting the "good" rating, the important issues are approached innovatively and efficiently, indicating that the Service provider has outstanding knowledge of the deliverables and risks. The proposal details ways to improve the project outcomes and the quality of the outputs.	
TOTAL POINTS	

A bidder must score 70 points or above to qualify for the price and specific goals evaluation.

11. Pricing template

The detailed description of the deliverables is in section 4 above.

Deliverable	Expected delivery timeline	Line-item price
1. QCTO Corporate Identity Guide documents		

2. Refreshed brand assets		
3. Updated templates		
	Sub-total	
	VAT @ 15%	
	GRAND Total including VAT @ 15%	