**BRANDING AND MARKING - GUIDANCE AND TEMPLATE**

**FOR ACQUISITION AWARDS**

USAID policy requires exclusive branding and marking in USAID direct acquisitions. Implementation of the policy requires the following documents: a Branding Strategy, a Branding Implementation Plan, and a Marking Plan (unless otherwise granted an exception by the appropriate USAID officer). When preparing these documents, USAID identity must follow guidance laid out in the USAID Graphic Standards Manual, no contractor logos or other competing identities are to be included (unless granted an exception by the appropriate USAID officer.)

BRANDING STRATEGY – The Contracting Officer’s Representative (COR) shall prepare the activity Branding Strategy containing information substantially similar to the sample provided below (ADS 320.3.2 and 320.3.2.1).

Branding Strategy for the [name of activity] Activity [award number] (Follow guidelines in March 16, 2016 USAID Graphic Standards Manual and Partner Co-branding Guide, Section 3.2).

From (Requesting Office) [\_\_\_\_\_\_\_\_]

Activity Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The [Contractor] will use full branding and the USAID tagline “From the American People” on materials and communications, which may be translated into local languages as appropriate. Co-branding/no branding will only be considered on a case-by-case basis as deemed appropriate by the Contracting Officer’s Representative (COR) and the Contracting Officer (CO).

The [include name of the activity] should have a high level of visibility since the purpose of the activity is to [include the purpose of the activity].

Activity documents will not use the contractor’s logo, but will acknowledge that the document was prepared for USAID’s review/approval by the [name of activity] Activity, [Contractor].

**BRANDING IMPLEMENTATION PLAN**

The Contractor shall prepare a Branding Implementation Plan describing how it will implement the Branding Strategy. The Branding Implementation Plan shall describe how the program will be promoted to beneficiaries and host country citizens.

With reference to ADS Section 320.3.2.2 the Contractor shall prepare a Branding Implementation Plan containing information substantially similar to the sample provided below:

**THIS PORTION IS TO BE CREATED BY THE CONTRACTOR**

Branding Implementation Plan for the [name of activity] Activity [Activity number]

From Requesting Office [\_\_\_\_\_\_\_\_]

* 1. HOW TO INCORPORATE THE MESSAGE

\_\_\_\_\_\_\_\_\_\_ will use full branding and the USAID tagline “From the American People” on materials and communications. Co-branding and no branding will only be considered on a case-by-case basis as considered appropriate by the Contracting Officer’s Representative (COR) and Contracting Officer (CO).

* 1. MESSAGES

In all materials and events the activity will be branded as from USAID and prepared by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as part of the \_\_\_\_\_\_\_\_\_\_ activity. As such, all materials will acknowledge that they were produced with support “from the American people.” In cases where a local language predominates above English, the appropriate translation into the local language will be used in branding the program.

Additional ideas to increase awareness that the American people support this program are: all of the trainers will be trained to include in each presentation or training session a statement at the beginning of their meeting or training session that the technical assistance that they provide and the other program services are made possible as a result of “the assistance from the American people.” The \_\_\_\_\_\_\_\_\_ activity will follow specific procedures for including the Branding Implementation Plan requirements as stated in the mandatory internal reference Branding and Marking in USAID Direct Contracting in the Automated Directives System, Chapter 320.

* 1. HOW TO PUBLICIZE ACTIVITY

This section discusses how to publicize the activity and also includes a description of the communications tools to be used. Such tools may include the following:

* + 1. TOOLS

The following communication tools will be used: Add to as needed and fill out.

|  |  |
| --- | --- |
| Press releases |  |
| Press conferences |  |
| Media interviews |  |
| Site visits |  |
| Success stories |  |
| Beneficiary testimonials |  |
| Professional photography |  |
| PSAs |  |
| Videos |  |
| Webcasts, e-invitations, blast e-mails, or other internet activities |  |

* 1. KEY MILESTONES OR OPPORTUNITIES

The following key milestones or opportunities are anticipated to generate awareness that the program is from the American people. These milestones may be linked to specific points in time, such as at the beginning or end of a program, or to an opportunity to showcase reports or other materials. These include, but are not limited to:

* + 1. holding training events,
    2. publishing reports,
    3. highlighting success stories,
    4. promoting final or interim reports, and
    5. communicating program impact/overall results.
  1. AUDIENCES

Subject to approval by USAID, the \_\_\_\_\_\_\_\_\_ activity has the following target audiences with whom it will promote and publicize USAID sponsorship:

* + 1. PRIMARY AUDIENCE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    2. SECONDARY AUDIENCE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  1. ACKNOWLEDGEMENTS
     1. ACKNOWLEDGING USAID AND THE USAID EQUATE FUNDING MECHANISM

The following acknowledgment will be included on external USAID \_\_\_\_\_\_\_\_\_ activity publications and internal publications, such as quarterly reports, as appropriate:

This document was produced for review by the United States Agency for International Development. It was prepared by \_\_\_\_\_\_\_\_\_\_\_\_\_ for the \_\_\_\_\_\_\_\_\_\_\_ Activity.

* + 1. ACKNOWLEDGING HOST-COUNTRY GOVERNMENTS

All \_\_\_\_\_\_\_\_\_\_\_\_\_\_ documents will follow USAID Branding Guidelines. If during the course of this program other major sponsors are involved, we will advise the COR of their involvement and request permission to include them as necessary.

* + 1. ACKNOWLEDGING OTHER HOST-COUNTRY PARTNERS

Co-branding with civil society groups will occur when these organizations have contributed funds to the activity. Co-branding with in-country partners may also be desirable when trying to promote local ownership and capacity building. However, when products are fully funded by USAID, CO approval is required for any exceptions to full branding requirements.

* 1. CO-BRANDING WITH OTHER INTERNATIONAL ORGANIZATIONS

In such cases, the guidelines for co-branding will be followed, assuming the funding contributed is more than a token amount.

**MARKING PLAN**

The Contractor shall also prepare a Marking Plan that will enumerate all of the public communications, commodities and program materials that visibly bear or will be marked with the USAID identity. Contract deliverables to be marked with the USAID Identity must follow design guidance for color, type, and layout in the USAID Graphics Standard Manual.

Marking is not required for recipient’s offices, vehicles, and items the recipient procures for its own administrative use.

With reference to ADS Sections 320.3.2.3 and 320.3.2.4 the Contractor shall prepare a Marking Plan containing information substantially similar to the sample provided below:

**THIS PORTION IS CREATED BY THE CONTRACTOR**

**Marking Plan for the [name of activity] Activity [Activity number]**

**From Requesting Office [\_\_\_\_\_\_\_\_]**

With reference to Section 320.3.2.3 of ADS 320, below is the required Marking Plan:

* 1. MARKING
     1. MARKING PLAN FOR MATERIALS TO BE PRODUCED

Table 1 outlines the types of materials that may be produced under the USAID \_\_\_\_\_\_\_\_\_ activity. Any materials that are not anticipated below, but are produced under the initiative, will also be subject to branding guidelines and CO approval, as appropriate. Please note that marking is not required on items used as part of the administration of the contract, such as stationery products, equipment, and offices. The goal is to mark programs and activities, and not implementing partners. Thus, letterhead, name tags, business cards, office space, equipment, and supplies are not subject to branding.

Every contract deliverable that is marked with the USAID identity for the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ activity will follow design guidance for color, type, and layout in the Graphic Standards Manual as related to equipment, reports, studies, events, and public communication (including printed products, audio, visual, and electronic materials). The USAID logo will be used for programmatic correspondence. \_\_\_\_\_\_\_ Letterhead will be used for administrative matters and will not have the USAID logo. Business cards will not show the USAID logo.

All studies, reports, publications, websites, and all informational and promotional products will contain a provision substantially as follows:

*“This study/report/website/video 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/website are the sole responsibility of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (name of organization) and do not necessarily reflect the views of USAID or the United States Government.”*

*“Este estudio/reporte/sitio web/video fue posible gracias al generoso apoyo del pueblo de los Estados Unidos, a través de la Agencia de los Estados Unidos para el Desarrollo Internacional (USAID). El contenido de este estudio/reporte/sitio web/video es responsabilidad de \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (nombre de la organización) y no necesariamente refleja el punto de vista de USAID o del gobierno de los Estados Unidos”.*

**THIS PORTION IS CREATED BY THE CONTRACTOR**

**Marking Requirements for the [name of activity] Activity [Activity number]**

**From Requesting Office [\_\_\_\_\_\_\_\_]**

With reference to ADS Section 320.3.2.2, below is the required Marking Plan:

|  |  |  |
| --- | --- | --- |
| TABLE 1. MARKING PLAN FOR MATERIALS TO BE PRODUCED - CHANGE AS NEEDED | | |
| **Category** | **Type of Marking** | **Remarks** |
| **Administrative** |  |  |
| Stationery products (administrative Business) | USAID standard graphic identity will not be used. | Pertains to letterhead, envelops, and mailing labels. |
| Stationery products (program related) | USAID standard graphic identity will be used. | Pertains to letters that accompany program materials. |
| Business cards | USAID standard graphic identity will not be used on business cards. The contractor must use its own business cards but may include the line "\_\_\_\_\_\_\_ activity" and the legend “USAID Contractor” on the business card. |  |
| Office signs | USAID standard graphic identity will not be used to mark activity offices. |  |
| Activity deliverables | Follows USAID Graphics Standard Manual guidelines for full branding. |  |
| Website | Follows USAID Graphics Standard Manual guidelines for full branding (If applicable). | All websites produced for USAID activities by contractors must have the approval of the Website Governance Board. |
| **Technical** |  |  |
| Technical reports and studies | The USAID identity will be printed on the cover of documents; design follows USAID Graphics Standard Manual guidelines for full branding unless co-branding is acceptable or an exception is granted for no-branding. |  |
| Briefing papers, memoranda, and policy recommendations | The USAID identity will be printed on the cover of documents; design follows USAID Graphics Standard Manual guidelines for full branding guidelines unless co-branding is acceptable or an exception is provided for no branding. |  |
| Government policies,  strategies, plans, and  guidelines (regional, national, and sub-national levels) or other materials positioned as being from the host-country government | The USAID identity will be printed on the cover of documents; design follows USAID Graphics Standard Manual guidelines for full branding guidelines unless co-branding is acceptable or an exception is provided for no branding. |  |
| Organizations' policies,  strategies, plans, and  guidelines (e.g., an NGO’s  procedures manual for malaria  logistics, a workplace antidiscrimination policy) or other  materials positioned as being  from the host-country partner | The USAID identity will be printed on the cover of documents; design follows USAID Graphics Standard Manual guidelines for full branding guidelines unless co-branding is acceptable or an exception is provided for no branding. |  |
| Training materials and manuals | The USAID identity will be printed on the cover of documents; design follows guidelines for full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| CDs-ROM | The USAID identity will be printed on the CD label, splash screen/menu, and packaging; design follows guidelines for full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| PowerPoint presentations | The USAID identity is required on title breaker slides; design follows guidelines for the full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| Conference posters and presentations | The USAID identity will be printed on the poster or presentation; design follows guidelines for professional meetings or full branding unless co-branding acceptable or an exception is granted for no branding. |  |
| Videos | The USAID identity is required at the beginning and/or the end of the video; design follows guidelines for the full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| Program materials | The USAID identity must be included on the materials; design follows guidelines for the full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| Technical web portal | Follows guidelines for co-branding; the USAID identity will be included on the homepage and sub-pages as appropriate. | Individual documents included on the portal will be branded as appropriate. |
| **Promotional** |  |  |
| Event signs, banners, and exhibition booths materials | The USAID identity will be printed on the materials; design follows guidelines for full branding unless co-branding is acceptable or an exception is granted for no branding. |  |
| Activity promotional materials (e.g., success stories, beneficiary announcement of research,  testimonials, findings, or activity results) | The USAID identity printed on the materials; design follows guidelines for full branding. |  |
| Materials for policy launch |  |  |
| Materials for site visits |  |  |
| Commodities |  |  |

1. **GRANTS UNDER CONTRACTS**

Grants under contracts, when authorized in accordance with ADS 302, “USAID Direct Contracting,” must be branded and marked like grants. The policy directives and required procedures for branding and marking of assistance awards in ADS Section 320.3.3 and 22 CFR 226.91 apply. The Contractor is responsible for including branding and marking requirements for these grants in it Branding Implementation Plan and Marking Plan, as part of its overall responsibility for managing grants under its contract.

1. **PREPRODUCTION REVIEW**

USAID requests preproduction review of USAID-funded public communications and program material for compliance with USAID graphic standards and the approved Marking Plan.