How To

Select and Work with an Advertising Agency

Handbook for
Population and Health
Communication Programs

Population Communication Services
Center for Communication Programs
The Johns Hopkins University School of Public Health

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Example

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USAID

Acknowledgments

As health and population programs around the world have become more adept at applying information, education, and communication (IEC) to deliver their messages, they have seen how communication can make a difference. By using a combination of mass media communication, interpersonal communication and counseling, and community mobilization in a well-planned integrated effort, many programs have effectively fostered the adoption of new health behaviors and community norms. Use of advertising agencies is often an integral component of these programs.

For more than a decade, the Johns Hopkins University Population Communication Services (JHU/PCS) project has provided technical assistance to dozens of population and reproductive health programs in working with local ad agencies to produce a wide array of communication messages to meet program needs.

Over the years, JHU/PCS has learned a great deal about how to implement the ad agency selection process effectively and how to create productive, mutually satisfying partnerships between family planning and health programs and their agencies.

The purpose of this handbook is to share the lessons learned from our experiences by providing population and health programs with a proven approach to selecting the most qualified ad agency and to managing the agency's work. The agency selection process and management principles presented in this book are based on years of real world experience.

The health communication and advertising professionals who prepared this book have put these ideas to work in the field. They have direct advertising agency experience to achieve the best results for health and population programs.

Produced with support from the United States Agency for International Development, this handbook was developed collaboratively by JHU/PCS and Prospect Associates, Ltd. Rachel Greenberg of Prospect Associates, Ltd., served as the primary author. Co-authors included Joan Yonkler and Gary Saffitz of Prospect Associates and Jim Williams and Jose Rimon of JHU/PCS. The book was designed by Prospect Associates, Ltd.

Additional information, examples, and review comments were provided by Patrick Coleman, Susan Krenn, Laurie Liskin, Alice Payne Merritt, Anne Palmer, Phyllis Tilson Piotrow, Patricia Poppe, Ward Rinehart, and Walter Saba at JHU/PCS in Baltimore; V.S. Chandrashekar at JHU/PCS in New Delhi; and Shivaji Bhattacharya of Thompson Social in New Delhi.

To request additional copies of this handbook and/or the floppy disk, please complete the order form at the back of the book and return it to JHU/PCS.

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Why Hire An Advertising Agency

Your program's success depends on an effective communication component. The communication process is complex, requiring experience and expertise that most governmental and non-governmental organizations do not have. Advertising agencies provide that experience and expertise.

Staffed by communication professionals skilled in every aspect of the communication process, an advertising agency offers objectivity, professionalism, and experience in assessing clients' needs for communication messages and materials. Their people bring creative talents and abilities that most clients would not have access to otherwise.

Constantly faced with new challenges and opportunities to give clients their best, ad agency professionals are innovative and resourceful in coming up with new solutions to communication problems. Most important, agencies know how to create promotional messages and materials to which the public will respond.

Working with an ad agency enables health programs to multiply their resources and to use them more efficiently. For example, ad agencies work regularly with all of the major media outlets. They have connections and relationships with media personnel that can make a big difference in getting population health messages placed most cost-effectively in television, radio, and print media. Further, ad agencies know the best production companies, the most talented artists, designers and photographers, and the most reliable printers. They know where to go and how to get the best prices for their clients. In addition, ad agencies are expert at private-sector approaches and techniques.

Working with an ad agency enables health programs to leverage private-sector resources such as commercial distribution channels, media tie-ins and contests, and audience research studies to support a program's communication objectives. Finally, while the ad agency is providing expert plans and materials, population and health program managers can focus on what they do best: setting policies, improving service delivery, training providers, and managing "the big picture." Working together, the agency and the program staff develop a common vision and goals for the communication program that the agency will implement.

When Should Health Communication Programs Use an Ad Agency?

An ad agency should be hired when program managers are planning a comprehensive communication campaign to change public knowledge, attitudes, and/or behaviors. Ad agency professionals can help:

- Develop communication strategies based on research.
- Design, write, and produce TV, radio, and print materials.

- Develop brochures and merchandising materials.
- Plan media campaigns and negotiate with the media so that you reach the largest number of people for the least amount of money.
- Prepare creative materials for pretesting messages with intended audiences.
- Monitor campaign effectiveness.
- Provide public relations expertise to increase exposure to key audiences.

If your program needs only to produce a single brochure or poster, one television, radio, or print ad, you do not need to hire a "full-service" ad agency. In that case, you may be better off hiring a company that specializes in graphic design or TV or radio production.

This handbook is intended to help you find, select, hire, and manage an ad agency for a complete campaign. Use this book to develop a productive, rewarding, and long-lasting partnership with your ad agency. The benefits of such a relationship will be incalculable—for you and for the agency.

How To Use This Book

Why Use This Book?

The advertising agency selection process presented in this book is intended to help choose **a full-fledged partner for designing, producing, and implementing comprehensive, multi-component, long-term communication campaigns.** If you are hiring an agency for that purpose, the process outlined in this book will help you select the most qualified agency to meet your needs. If you are hiring an agency just to produce a brochure, a poster, or a single broadcast spot, you do not need to follow this comprehensive approach. Adapt the steps to your needs for a simpler, less involved process.

The selection process outlined in this book is designed for conducting a fair competition open to all qualified agencies. In some countries, funders and/or government ministries will have very strict requirements for maintaining the fairness of the competition and for documenting the process. By following the selection process outlined in this book, you will meet most requirements for a fair, even-handed competition. Even if not mandated, it is a good idea to be as fair and even-handed as possible. That way, you will be more likely to select the best possible agency partner and to ensure the success of your program. The more successful your communication program is the better the outcome for your organization, the agency, and the audiences you are trying to reach.

The advertising industry in developing countries is very different from one country to the next. Some countries have many agencies, with a wide range of capabilities; some have only a few agencies with perhaps more limited capabilities. The selection process will vary depending on the nature of the advertising industry in your area. Adjust the process to meet your circumstances.

Who Should Use This Book?

This book is written for professionals charged with selecting and managing an advertising agency partner. This includes:

- Population and health program staff at governmental and non-governmental organizations.
- Communication and social marketing managers.
- Resident advisors and program officers.
- Communication consultants and trainers.
- Contracting officers.
- Funding organization managers.
- Donor agency officials.
- College professors.
- Advertising agency personnel.

Tips

SAMPLE
Sample

Checklist

#
Score Sheet

Forms

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Schedule

1-Page
Primer

EXAMPLE
Example

How This Book Is Organized

This handbook is designed as a step-by-step guide to help you and your organization *find, select, hire,* and *manage* your work with advertising agencies.

Divided into five major chapters, the handbook includes a complete array of tools such as checklists, tips, sample forms, schedules, and documents that are ready for you to use. Feel free to duplicate them and use them as they are presented or customize them to meet your particular needs. Each tool is marked with a special symbol or icon to indicate its use, as shown in the left-hand margin.

To illustrate key points, the handbook is sprinkled with actual examples of how managers and program staff have tackled the agency selection process and the results they have achieved. Borrow from these examples and from the case study in Chapter 5 to design your selection process.

The Appendix includes several tools to help you select and manage your agency partnership. There is a glossary that defines many of the words and terms that are used throughout the book. In addition, there is a sample Agency Brief and templates for ad agency contracts that you can adapt for developing your own documents.

To help you customize all of the tools and documents for your agency selection process, JHU/PCS can provide you with a floppy disk. The disk contains templates for each tool, including the ad agency contracts in the Appendix. Please fill out and return the order form at the back of the book if you would like to receive a floppy disk or additional copies of this handbook.

Read the whole book first to help plan your selection process. Share it with members of your staff and others who will be working with you in selecting and managing the ad agency. Use the information and tools in each chapter to plan and implement each step of your selection process.

Refer to this book often when managing your agency partnership. Most important, use it to work with the agency to achieve successful results for your program. We wish you great success.

How Advertising Agencies Work

Advertising agencies are unique and may seem very different from your own organization. This section is designed to help guide your search for an agency and to familiarize you with the kinds of capabilities that ad agencies in your area are likely to offer.

How Advertising Agencies Are Structured

Ad agencies are managed and staffed by communication professionals who have uniquely refined skills. Some agency professionals specialize in crafting and producing communication messages—the "creative" side of the business. Others are expert in placing the messages—the "media side" of the business. Others are strategic planners with strong backgrounds in "marketing" products and services and who are instrumental in planning all aspects of a communication program. Other staff members may specialize in research, public relations, or sales promotion. The people who pull it all together are the "account executives" or account managers who manage the agency's business with its clients. Still others deal with the management, personnel, and financial functions that are required by any organization.

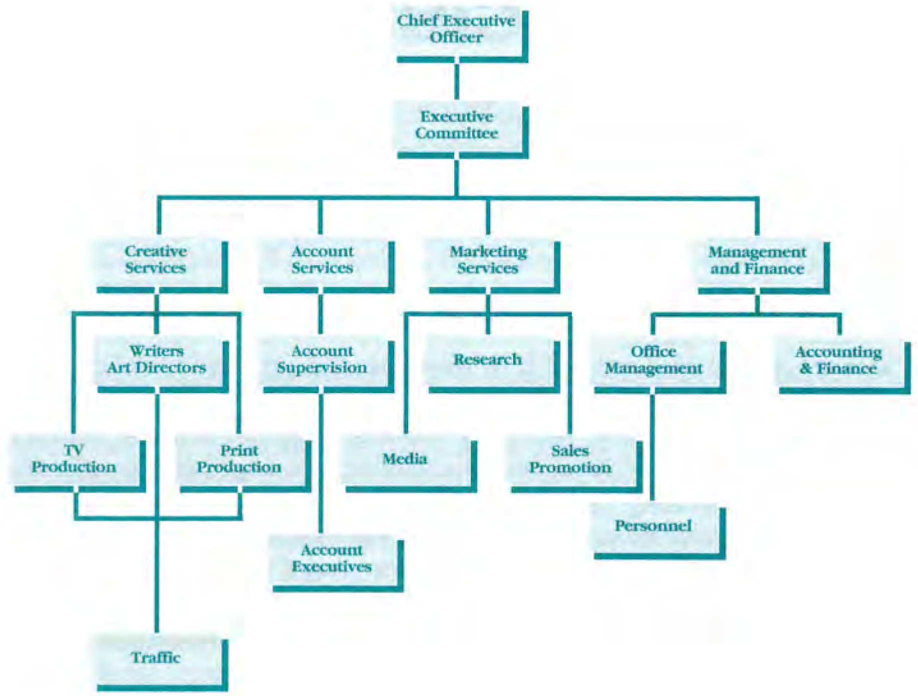
The Creative Services Department

The creative services department is run by the creative director, the person who has overall responsibility for all of the creative products produced by the agency. The creative department manager oversees the daily operations of the department, making sure that projects are assigned to the right people and that they get done. The people who create the agency's messages include: the copywriters who write the copy or text for messages and materials; the art directors who conceptualize, develop, and draw the ideas for creative products; and the producers who translate the words and pictures into finished print and broadcast messages. These three professionals often work together as a group on client projects.

The Media Department

The media department develops the plans for placing the client's advertising messages in the most appropriate print and broadcast media and makes sure that the media plan is implemented correctly. The media planner develops the media plan; the media buyer executes it. The media department's job is to develop the best possible plan for meeting the communication campaign's objectives for reaching the intended audience. The agency—and the client—rely on the media department's expertise and knowledge about all of the available media, their coverage, and the media habits of the audiences the client is trying to reach.

How a Typical Advertising Agency Is Organized



The Research Department

Some agencies have fully staffed research departments that can design and manage a wide array of market and communication research services to meet client needs. Others have more limited capability, with only a few researchers on staff who do not work within a research department per se, but are integrated into account teams. Many agencies do not have a research department of their own. Instead, they work with independent research companies.

The Account Services Department

The account services department makes sure that the ad agency's resources are allocated to meet client needs. The account management supervisor oversees all agency accounts and reports directly to top management. The staff member responsible for servicing clients' day-to-day needs is the account executive. The account executive is the person who deals directly with the client, who coordinates all of the agency's planning, creative, media, and research activities for the communication program, and who obtains client approvals for the agency's work. Account executives usually report to an account supervisor who oversees and coordinates several agency accounts.

Account Planning

Although the planning function may not be handled by a specific department, most agencies provide communication campaign planning services to their clients. After reviewing essential background information about a client's product, service, or program, the agency will develop recommendations about the objectives and the strategy for a communication campaign. Some agencies form a "plans board" or an executive committee to develop and review the account planning; some will hold informal meetings of the account team to do the job. Still others have individuals on staff who specialize in strategic planning and consumer behavior. These planners bridge the gap between research, account management, and creative personnel by working as part of the account team and by providing a thorough understanding of the client's audience to the group.

Other Advertising-Related Organizations

The typical "full-service" ad agency performs a wide array of services for their clients. In many countries, smaller more specialized companies that provide advertising-related services are also available and may be hired directly by the ad agency to work on the communication program. Others may be hired directly by the client to supplement the ad agency's capabilities.

- Companies that specialize in providing creative services are called "creative boutiques." These companies focus solely on producing broadcast and print messages and materials for their clients.
- "Media buying services" are staffed by specialists in the media aspects of advertising.
- "Production companies" often are hired by an ad agency to provide the specialized services needed to produce the audiovisual messages that clients require.
- "Art Studios" produce the finished artwork needed for communication campaign messages and materials. Depending on the campaign's creative strategy, the ad agency's art director will select an artist to develop the campaign artwork. Typically, artists specialize in either ink drawings, watercolor drawings, oil paintings, or photography.
- "Research companies," which are independent of the ad agency, may offer a wide range of research services or they may specialize in certain types of research. Some are expert in surveying public knowledge, attitudes, and behavior, and studying the impact of communication campaigns. Some concentrate on conducting smaller scale focus group research. Others specialize in pretesting communication messages before they are finally produced and distributed.

Chapter 1

Finding and Reviewing Ad Agencies

Steps To Take

1
Define your communication needs.

2
Identify the ad agencies in your geographic area.

3
Request information about the agencies' capabilities.

4
Review the agencies' capabilities against your communication needs.

5
Develop your "short list" of qualified agencies.

6
Conduct "investigational" meetings with the qualified agencies.

Overview

Your organization has decided to hire an advertising agency to communicate its message and you need to find the most qualified agency to be your partner. Where do you start? In this chapter, you will begin the selection process by finding and reviewing the ad agencies that are capable of meeting your needs.

In Step 1, you will start the selection process by defining your communication needs. Once you determine what services you will need from an agency, you will be in a much better position to focus your search accordingly.

In Step 2, you will identify the ad agencies in your geographic area by talking with people you know and checking other available sources to develop a comprehensive list.

The next step is to find out which agencies have the capabilities to meet your communication needs. Your objective at this stage is to identify all qualified agencies by casting a wide net and keeping an open mind. Therefore, in Step 3 you will send out a letter requesting information about the agencies' capabilities.

Once you have received the agencies' responses, in Step 4 you will review them and determine which ones have the experience and capabilities you are looking for. For example, if you have a clearly defined need for television and radio advertising services, you can eliminate those agencies that only create print ads.

In Step 5, you will develop your "short list" of the agencies most qualified to meet your needs. In Step 6, you will meet with each of these agencies to invite them personally to bid on your account. Use these "invitational" meetings to get a feel for each agency and what it might be like to work with its people.

If you have never worked with an ad agency on a major communication campaign, or if it has been a long time since you have, follow the steps described in this chapter for conducting a thorough search and review. Gather information about the agencies, visit them, talk to other people about them, and assess their capabilities.

If you are familiar with the agencies in your area and you know which ones should probably be included on your short list, quickly review this chapter anyway. Things are always changing, and it is important to keep an open mind. For example, you may choose to request information about the capabilities of any new ad agencies that have been formed recently. Also, you may want to find out whether existing agencies may have added or eliminated capabilities that they had previously.

If your organization or the business culture in your country requires that you invite all interested advertising agencies to compete for your account, you may need to adapt the comprehensive approach detailed in this chapter to meet your needs. For example, once you have defined your communication needs, you may need to send letters to an extensive list of the ad agencies in your area announcing your plans to hire an agency. Ask all interested companies to send you a letter stating their capabilities and their interest in bidding on your account. You would then proceed to conduct the selection process, as described in Chapter 2.

Step 1.

Define Your Communication Needs

Why do you need an advertising agency's services? What specifically do you want the agency to do?

Set up a meeting with key members of your staff who will be involved with the communication campaign to discuss these important questions. Working together, use the checklist on page 5 to help define what the advertising agency will do.

After you have identified and learned about the various agencies in your area, refer back to this checklist to help you determine which agencies are best suited to meeting your needs. This select group will be the "short list" of agencies you will invite to bid on your account.

Checklist for Defining Your Communication Needs

We need an advertising agency to help us: (Check all that apply)

- ❑ **Conduct formative research** to help identify audience segments, relevant messages, and strategic directions.
- ❑ **Develop a comprehensive strategy** for communicating family planning/health messages.
- ❑ **Provide creative ideas** on how best to communicate a message.
- ❑ **Prepare materials for pretesting** creative ideas and messages with the intended audience to refine and strengthen their effectiveness.
- ❑ **Write and produce new advertisements** for TV, radio, or print.
- ❑ **Produce TV/radio ads and/or a video/TV program** for a script that is already developed or written.
- ❑ **Write, design, and produce printed materials** such as brochures, posters, and other collateral materials.
- ❑ **Plan media** strategies and determine which media channels will be most effective in reaching our audiences. **Negotiate/purchase and/or place** our spots in selected media channels and/or programs. **Verify** that our ads actually appear as intended.
- ❑ **Provide merchandising support for developing, distributing, and placing** signs, logos, posters, danglers, and other promotional materials in family planning and health service delivery points.
- ❑ **Plan and implement outdoor billboard, transit,** and/or other **community-based communication efforts.**
- ❑ **Write, design, and produce materials to support interpersonal communication and counseling** such as brochures, flip charts, and audiovisual presentations.
- ❑ **Provide public relations support** such as planning and conducting special events, ensuring media coverage, creating program launches, holding public rallies, etc.
- ❑ **Shift the burden of responsibility** for implementing and monitoring a nationwide campaign in many different parts of the country.
- ❑ **Identify and create private/public-sector partnerships** by leveraging the agency's influence with media outlets and other businesses.

Step 2.

Identify the Ad Agencies in Your Geographic Area

Once you have determined your communication needs, the next step is identifying the ad agencies in your geographic area. There are many different sources to contact for developing your list. See page 7 for a complete set of tips for finding the ad agencies in your area.

As you gather information, set up an "Advertising Agency" file in which you can compile information about the agencies and all possible names, addresses, contact numbers, show reels, and sample materials for ready reference.

Perhaps you already know about some of the agencies in your area. But there may be others you do not know about. For example, in many countries new agencies are starting up all the time, and changes in agency affiliations and capabilities are taking place at a rapid pace. Keep in mind these simple guidelines as you conduct your search:

Guidelines for Identifying Ad Agencies

- **Cast a wide net.** Try not to limit your initial search in identifying agencies. Put together as comprehensive a list as possible. If you have worked with agencies in the past, do not let previous biases or favorites influence development of your agency list. Now is the time to be inclusive. Future steps will narrow the field.
- **Include the "big name," well-known agencies.** Do not underestimate the value of your work by thinking you belong only with a small agency. Do not assume that a "corporate" agency will not be interested in "government" or "nonprofit" work. Experience around the world has shown that the big multinational agencies have a genuine interest in working on campaigns that focus on important national and social issues that benefit the public. Although your account may not be as big as Coca-Cola, chances are your needs and budgets may well be of sufficient size to pique their interest.
- **Look for specialization.** Some ad agencies (e.g., Lintas and J. Walter Thompson) have spawned special units that handle only communication on social issues such as health and family planning. Search for these niche specialists.

EXAMPLE In India, JHU/PCS helped the Indian Medical Association hire an advertising agency to conduct a major promotional campaign. Local affiliates of several of the largest worldwide advertising agencies competed for the account, including: J. Walter Thompson (JWT); McCann Ericson, Lintas, Grey; and Ogilvy & Mather. Interestingly, Thompson Social, the agency that won the account, had been established by JWT as a separate group specifically dedicated to handling mass media, community-based, and interpersonal communication programs on social issues.

Tips for Finding the Ad Agencies in Your Area

- Contact people you know who have worked with local ad agencies and ask for their opinions and recommendations.
- Find out names of agencies from other population and health programs.
- Contact media outlets, such as national and local newspapers, magazines, and TV and radio stations, and ask them about ad agencies in your area.
- If you have seen or heard any particularly good ads, or ads that address your intended audiences (e.g., milk ads for women or razor blade ads for men), ask your media contacts which agencies produced the ads.
- Review any available telephone and business directories for listings of advertising agencies.
- Check with the local chamber of commerce or business-oriented government agencies, if available, for information about advertising agencies.
- Find out if there is an advertising agency association or advertising club in your local area or in the country and ask for a list of its members.
- Consult trade and professional magazines devoted to advertising and marketing if available. Some of these publications conduct annual surveys of ad agencies and publish lists of agencies ranked by size with key names, addresses, phone numbers, etc.

Step 3.

Request Information About the Agencies' Capabilities

Now that you have identified the ad agencies in your area, you need to find out which agencies have the capabilities and experience to meet your needs. What is the best way to learn about the agencies?

Prepare and send out a letter like the sample on page 9. Request a description of the agencies, including: their capabilities, their senior staff members, their current clients, their experience on accounts similar to yours, and their billings (or revenues). The responses you receive should give you a good overview of the agencies' capabilities and will tell you whether or not they are qualified to service your account.

Be sure to send the same letter to all of the agencies so that you receive responses you can compare when narrowing the field. Also, be sure to specify a return date so that you can move ahead with your search on schedule.

Letter for Requesting Ad Agency Capabilities Information SAMPLE

Dear Sir or Madam:

We are in the process of searching for an advertising agency to help us develop (Provide a brief description of your communication needs. For example: to create and produce television, radio, and print ads for a mass media communication campaign on long-term family planning methods to reach married couples of reproductive age.)

To begin the process, we would like to learn more about your agency to determine if it is capable of meeting our needs. Please provide the following information:

1. A description of your advertising agency, including the full name, address, telephone number, fax number (if available), key contact person, number of branches, and locations.
2. Agency ownership and/or affiliation with any multinational agency or network; number of years in business.
3. A list of the agency principals and a brief description of each person.
4. Number of employees: ____ Full time ____ Part time ____ Consultants
5. Your total annual billings for each of the last 3 years.
6. For the past 12 months, indicate the percentage breakdown of your billings in:

   ____ Television ____ Radio ____ Newspapers ____ Magazines
   ____ Outdoor ____ Public relations ____ Point-of-purchase/service
   ____ Other (please specify) ______________________________

7. A list of your current clients, the date that you started working with them, and a brief description of the main services you perform for each one.
8. Your experience in marketing and advertising related to social issues such as reproductive health, maternal and child health, sanitation, etc.
9. A description of your capabilities and expertise in providing the following services: creative development, media planning and buying, public relations, and research.
10. A brief case study of a successful campaign similar in nature to our communication program.

After we review agency capabilities, we will narrow our list to the most qualified agencies. We will conduct meetings with these agencies and ask each agency on the shortened list to submit a written proposal to bid on our account. We expect to bill (insert projected budget figure) over a 12-month period beginning (insert start date).

We would appreciate a response to this letter by (fill in date). If you have any questions, please do not hesitate to contact me at (your telephone number). Thank you for your cooperation. We look forward to hearing from you.

Sincerely yours,

(Name and title)

Step 4.

Review the Agencies' Capabilities Against Your Communication Needs

Not all of the agencies that respond to your solicitation will have the capabilities to handle your communication needs. The best way to determine which agencies are most suitable to compete for your account is to review their responses relative to your needs. The quality, completeness, and promptness of the response will also give an indication of how seriously each agency is interested.

Once you have received the agencies' responses, review them to determine which agencies appear to have the capabilities and experience you are seeking. For example, if you have defined a specific need for television and radio ads, you can eliminate those agencies that only do print ads. Similarly, if you need advertising and public relations services, your search should focus on those agencies that can provide both services.

Use the Guidelines for Reviewing Agency Capabilities on page 11 to help you identify the most qualified agencies for developing your short list.

EXAMPLE Knowing your own organization's strengths and determining your needs for an agency is an essential step in the selection process. The Nigeria Family Health Services Project and JHU/CCP asked five ad agencies to bid on developing and designing a family planning logo. The agency responses demonstrated the different capabilities among local agencies. One proposal indicated a good creative instinct, but the agency did not have the network infrastructure to implement the logo campaign nationally. Another was weaker on creative, but the agency had the capability to distribute the logo nationally.

After reviewing the proposals, the Nigeria Family Health Services Project concluded that since the organization had good creative people in-house, but lacked the ability to distribute the logo nationally, it was more important to hire an agency that had national distribution capabilities. The organization traded creative strengths for the ability to provide national support.

Guidelines for Reviewing Ad Agency Capabilities

- **Agency Description.** Look for a clear, concise description of the agency, its mission, its approach to advertising, and its corporate history.
- **Agency Ownership and Affiliation.** Agencies that are owned by or affiliated with large, global organizations may have more resources, talent, and experience working with a wide array of clients. Although this depth of resources and experience may be more typical of agencies owned by or affiliated with multinational companies, you may find smaller, independent agencies that bring the same qualities to their work with clients. Each agency must be evaluated on its own merit.
- **Agency Principals.** Note how many years and what type of advertising experience the agency's principals have, what accounts they have managed, and their role at the agency. For example, do they manage the agency's creative activities such as copy writing, graphic design, and TV/radio production? Or do they manage strategic planning, client services, or bringing in new clients to the agency?
- **Staff Size.** The agencies' staff size will give you an idea of how big or small they are, how many full-time and how many part-time staff members they have.
- **Agency Billings (or Revenues).** The agencies' billings for the last 3 years will tell you more about their size, the amount of business they have been doing each year, how stable their business is, and whether it has been expanding, shrinking, or staying the same.
- **Agency Billings by Medium.** Information about the agencies' billings by medium will give you an idea of what media they work in and where their influence, emphasis, or expertise may be strongest. Larger agencies tend to have more clout with the media and more contacts and resources.
- **Current Clients.** The agencies' current client list will let you know what products, services, and audiences they are currently working with. As you review their client list, answer these questions: Do you recognize the clients' names? Do you remember any ads for these clients? Do they work on a broad range of accounts? Do their accounts show experience in communicating with your intended audiences?
- **Experience in Marketing and Communication Related to Social Issues.** Review the agencies' experience in marketing and advertising related to social issues and behaviors such as family planning, health, nutrition, and sanitation. Compare the depth of their experience working on social issues with their other client work. Do you recognize the social issue campaigns they have worked on? Do you know if they were successful? Do they appreciate the unique nature of these programs?
- **Agency Resources.** In reviewing the agencies' capabilities, look for the following information:

  Creative. Do they have a creative department? Do they have creative directors, art directors, copywriters, and graphic designers on staff? How much and what kind of experience do the creative staff members have? Have they described how the creative staff works with account managers and clients to produce advertising campaigns? Do they state and exhibit a creative philosophy?

  Media. Do they have a media department? Do they have media planners and media buyers on staff? How much experience do the media staff members have? Do they have systems in place for monitoring and verifying the ad time or space they purchase for their clients? Have they ever negotiated for free advertising time or space from media outlets? What are their relationships with the media representatives? Do they have experience with nontraditional channels of communication such as folk media, street drama, and interpersonal communication?

  Public Relations. Do they have a public relations department within the agency or are they affiliated with a public relations firm? How much and what types of experience do the public relations staff members have? What types of clients have they worked with? What types of public relations services do they provide? How do public relations staff members work with account managers, creative staff, and clients in planning and implementing campaigns?

  Research. Do they have a research department with experienced market researchers on staff? How much experience do the research staff members have? What types of research studies do they conduct? How do research staff members work with account managers, creative staff, and clients on advertising campaigns? Are they affiliated with a market research firm?

Step 5.

Develop Your "Short List" of Qualified Agencies

Once you have reviewed the agencies' capabilities, you are ready to select your short list of the most qualified agencies. In developing your short list, you want to achieve a balance between a sufficient number of agencies to have a competition and a maximum number that you can handle. As a guideline, you should probably have a minimum of three agencies and a maximum of six agencies. These are the agencies that should be invited to bid on your account.

Remember, you are *not hiring an ad agency* at this point. Rather, you are *eliminating those agencies that are not suitable to meet your program's communication needs* based on your review of their capabilities.

The end goal in short listing is to make sure that every agency invited to bid on your project meets the *minimal required qualifications* to do the work. You will want to give all of the qualified agencies a chance to demonstrate how they can help you meet your program objectives during the proposal and bidding process.

In managing the selection process, you will want to avoid any appearance of unfair bias or the potential for a protest—either by the ad agency or by your funding organization. Be fully prepared to justify why each agency is or is not being invited to bid on the project. It is a good idea to save all correspondence, the agency capabilities statements, your review notes, and other documents that are generated during the selection process.

Complete the form on page 13 to organize your short list. This list will come in handy when contacting the agencies to set up meetings and for distributing future mailings.

EXAMPLE In Peru, JHU/PCS assisted APROPO (Advocacy for Population Programs), the Peruvian health communication and marketing NGO, to convince the larger, well-known agencies to bid on their account. Some of the larger and better agencies in Peru do not believe bidding processes are truly competitive. They think either the request for agency proposals is already "wired," that is, intended for a pre-selected agency or that it is just not worth their effort.

To overcome these barriers, APROPO met with the agencies on their short list to change their minds about bidding. The program staff impressed the agencies by: 1) their thorough briefing in advance on the request for proposals and the selection process, and 2) their clear articulation and depth of knowledge about the program's intended audiences.

Short List of Qualified Agencies

Agency Name: ______________________________
Contact Person: ______________________________
Address: ______________________________
____
Telephone: ______________ Fax: ______________
E-Mail: ______________________________

Agency Name: ______________________________
Contact Person: ______________________________
Address: ______________________________
____
Telephone: ______________ Fax: ______________
E-Mail: ______________________________

Agency Name: ______________________________
Contact Person: ______________________________
Address: ______________________________
____
Telephone: ______________ Fax: ______________
E-Mail: ______________________________

Agency Name: ______________________________
Contact Person: ______________________________
Address: ______________________________
____
Telephone: ______________ Fax: ______________
E-Mail: ______________________________

Agency Name: ______________________________
Contact Person: ______________________________
Address: ______________________________
____
Telephone: ______________ Fax: ______________
E-Mail: ______________________________

Step 6.

Conduct "Invitational" Meetings with the Qualified Agencies

Now that you have determined which agencies are most qualified to meet your needs, contact them to set up meetings with their key people.

Use these meetings to invite the agencies on your short list to bid on your account. Tell them about your program and get the agencies excited about bidding on your project. Also, go prepared to learn more about the agencies, their people, their facilities, and their approach to working with clients on communication campaigns.

Create an agenda for your meetings like the sample on page 15. Send a copy to the agencies in advance so that they can prepare for their meeting with you. Ask the agencies to have the key staff members who might work on your account present at the meetings.

You may want to bring one or two other staff members from your organization to the meetings, **but be sure that the person in charge of the agency selection process goes to all of the meetings with the agencies.** Take notes during the agencies' presentations or write up your observations following the meetings.

The most important aspect of an ad agency is its people. As you meet with the agencies, try to get a feel for what it might be like to work with the agency and its staff. Look for people who are confident and well-organized, who take pride in their work, who work well with each other, and who strongly believe in their ideas. After each meeting, ask yourself whether you think you will be able to develop an effective partnership for your advertising program with the agency.

One last guideline: Try not to be swayed by your initial impressions of the agencies. Some agencies that appear very capable when you meet with them may fall short in preparing their proposals. Others that made a less than favorable first impression may propose great ideas and demonstrate real brilliance in their proposals and personal presentations later on. Keep in mind that you may have a second meeting with the agency, once the finalists are chosen during the selection process described in Chapter 2.

EXAMPLE Visiting agencies helps identify differences in agency "personality" and provides insights into what it might be like to work with each company. In one country, these differences were dramatic.

One agency was run like a large government bureaucracy. Every time the president walked in, people who were practically sleeping at their desks would jump to attention and stand in fear. Once he left, everyone would sit down and eventually drift off back to sleep. Very little actual work was being done. We judged this agency as being far from an energetic and creative environment.

At another agency, it was very clear that only the president could speak on behalf of the agency. Every question asked of the various agency staff (media, creative director, account executives, research specialists) about their work was deferred to and answered by the president. We could only imagine how difficult it might be to get agreements and to move work ahead if the president were away on business or vacation.

A third agency was again quite different. Lots of young people were busy preparing campaign materials, planning special events, and openly clamoring over ideas. The meeting with the agency staff had everyone participating: the media people talked about media, the creative director presented how the agency created and produced TV spots, and the research director talked about information that goes into creating a campaign. At this agency, the president introduced the lead account supervisor, who in turn ran the meeting and led the discussion. We liked the hands-on approach and it demonstrated the capability of the people who would work on our account.

SAMPLE

Agency Meeting Agenda

I. Introductions of Key Staff Likely To Be Assigned to the Account

II. Briefing on (Your) Program and (Your Communication Needs)

III. Agency Presentation (Agencies should address the following questions in their presentations.)

- How is your agency similar to and different from other agencies in our area?
- Can you show us relevant examples of broadcast and print materials produced by the agency (especially those produced by staff members to be assigned to the account)?
- What do you consider to be your strongest capabilities and why?
- What has been your most successful campaign? Why do you think it succeeded?
- How do you involve your clients in the strategic planning and creative processes?
- What else would you like to tell us about your qualifications?

IV. Agency Tour

Schedule for Finding and Reviewing Ad Agencies

Take action. Set your schedule for finding and reviewing ad agencies using this action plan.

Action	Dates	
	Start by:	Complete by:
1. Define your communication needs. ■ Meet with other program staff to define your communication needs. ■ Obtain any necessary approvals for hiring an ad agency to perform the services you have defined. ■ Confirm budget amounts (in writing, if possible).		
2. Identify the ad agencies in your geographic area. ■ Contact people you know for names of agencies. ■ Watch and listen for high-quality ads. ■ Contact media outlets for names of agencies. ■ Check business directories and other sources. ■ Develop a comprehensive agency list.		
3. Request information about the agencies' capabilities. ■ Draft the letter requesting agency capabilities. ■ Obtain any necessary approvals for sending out your request. ■ Set the deadline for agency responses (about 2 weeks from date of receipt). ■ Finalize and send your letter. ■ Contact the agencies to confirm receipt of your letter, if advisable. ■ Keep track of which agencies respond to your letter. ■ Check with agencies that did not respond and find out why.		
4. Review the agencies' capabilities against your communication needs. ■ Eliminate those agencies that did not respond or are not capable. ■ Review each agency's response using the guidelines provided. ■ Determine which agencies have the capabilities that match your communication needs.		
5. Develop your "short list" of qualified agencies. ■ Determine which agencies should be invited to bid on your account. ■ Write up the reason(s) for your decisions, if necessary. ■ Create your short list of qualified agencies for sending correspondence and contacting agencies by phone or fax.		
6. Conduct "invitational" meetings with the qualified agencies. ■ Contact the agencies to set up meetings. ■ Send them your suggested meeting agenda. ■ Conduct meetings with each agency. ■ Write up your observations of your meetings.		

Chapter 2

Selecting Your Agency Partner

Steps To Take

1
Prepare and distribute the Agency Brief.

2
Conduct a Bidders Conference (if required).

3
Select the Proposal Review Committee.

4
Review and score the agency proposals.

5
Convene the Proposal Review Committee.

6
Select the winning agency.

Overview

Now that you have identified the short list of ad agencies most qualified to meet your needs, you are ready to select your agency partner. In this chapter, you will plan and implement a fair and competitive bidding process to select the winning agency.

Establishing a completely fair and objective competition is essential to your success. By doing so, you will help ensure that your organization:

- Selects the best possible agency partnership for your program.
- Obtains the most reasonable price for work of comparable quality.
- Provides an equal opportunity to all qualified agencies to compete for your account.
- Meets the funding agency's requirements for selecting outside vendors.
- Avoids any protests—either by the funding agency or by the ad agencies you did not select.

Follow the Guidelines for Maintaining a Fair Competition throughout this chapter to maximize your success in selecting the right agency while minimizing the risk of any protests or challenges.

The bidding process described here is designed for selecting a long-term agency partner who will help produce and implement a comprehensive, multi-media communication campaign.

If you need only to produce a single advertising material such as one print ad, one radio or TV ad, you may not need a full-service ad agency and therefore do not need to follow the process suggested here. In that case, if you know the agencies' capabilities, give the qualified agencies an Agency Brief or Scope of Work, and possibly a Communication Message Strategy Outline like the sample on page 27, and ask them for a cost proposal.

It is essential to understand that the bidding process is designed to provide the *basis and rationale for selecting* an agency partner. Although it is possible, *it is not likely that the winning agency's proposal will be used as the final plan or the actual advertising campaign that ultimately will be implemented.* During contract negotiations (see Chapter 3. Hiring the Ad Agency), you will meet with the agency to further define the specific tasks, final products, timetable, and budget for the agency contract.

Start the bidding process in Step 1 by preparing and then distributing your "Agency Brief" and the invitation to bid to the short-listed agencies. Follow the guidelines for developing a clear, comprehensive brief that gives prospective bidders the information they need to develop a good proposal.

If required by your organization or your funding agency, you will need to plan and conduct a "Bidders Conference" as described in Step 2. The purpose of this meeting is to answer any questions the agencies may have before they submit their proposals.

To maintain the integrity and fairness of the competition, you will establish a Proposal Review Committee in Step 3. This committee will review the agencies' proposals and help select your agency partner. Committee members should include people who understand advertising and communication and who can make the time to review all the agency proposals, meet with the committee to select the winning agency or top finalists, and meet with the finalists if necessary to select the winning agency.

In Step 4, you will prepare and distribute the evaluation tools required for reviewing the agency proposals. You will develop the Scoring Criteria (which you will need to include in the Agency Brief), a set of Proposal Review Guidelines, and Score Sheets for the reviewers to use when rating the agency proposals.

You will convene a meeting of the Proposal Review Committee members in Step 5. The purpose of this meeting is to enable reviewers to discuss the agency proposals and their scores as a group. At this point, you will either select a clear winner, or most likely, the two or three top finalists.

The selection process concludes with Step 6. The Proposal Review Committee will meet with the finalists to hear oral presentations of their proposals and to clarify key ideas and approaches. Committee members will make any necessary adjustments in their initial scores and factor in their impressions of the "personal chemistry" they experienced during the agency meetings. They will help you select your agency partner, and you can begin notifying the winning agency and the losers of the outcome. Finally, you will organize all of the correspondence, proposals, and evaluation tools in case you need to document your agency selection process.

Step 1.

Prepare and Distribute the Agency Brief

The Agency Brief describes your project and your communication needs. It also defines the rules of the competition and states your requirements for the agencies' participation in the bidding process. It asks the agencies to prepare a "Technical" and a "Cost" proposal in response to your description of the scope of work.

In preparing the Agency Brief, use the sample outline on pages 23 and 24 and the example of an Agency Brief in the Appendix as a guide. Also, follow the guidelines on page 22 for developing a good agency brief. These items provide detailed road maps to help you develop your own document.

Discuss your ideas for the Agency Brief with other staff members and have them review a draft of this document. It is essential to obtain agreement and approval on the scope of work and the Agency Brief within your organization (and from the funding agency if applicable) before the brief is distributed to the ad agencies on your short list.

Once you have finalized your Agency Brief, prepare your letter of invitation to bid. This same letter should be addressed to each of the agencies on your short list and should:

- State your needs for an advertising agency's services (i.e., the scope of work);
- Describe briefly the contents of the Agency Brief;
- Explain your procedures for answering bidders' questions; and
- Highlight the deadline and location for submitting proposals.

Be sure to obtain all necessary approvals before you distribute the Agency Brief and the invitation to bid.

Guidelines for Maintaining a Fair Competition

When Preparing the Agency Brief:

Set a firm deadline for everyone. Give all agencies the same date, same time, and same location (for attending the Bidders Conference and) for submitting their proposals. Give the agencies enough time to respond. A good guideline is 3 weeks from the time they receive the Agency Brief. Make it clear that late proposals will not be accepted.

Give all bidders the same information. Give all competing agencies the same Agency Brief and background materials so that they can compete fairly for the job. Make sure every copy of the brief that you send out is complete and is not missing any pages.

Create a clear understanding of the bidding process. Describe the bidding process in detail, specify your requirements for submitting responsive proposals, and explain the review process and evaluation criteria you will be using in selecting the winning agency. (Do not identify the specific members of the Review Committee.)

Specify your requirements for responsive proposals. Clearly describe all required elements of the technical and cost proposals so that nothing is left open to interpretation.

Guidelines for Preparing a Good Agency Brief

Give enough background information. A good Agency Brief includes the most important program information that bidders need to prepare a thoughtful and creative proposal. For example, you may want to attach key sections of program documents, research reports or summaries, background articles, or even current or previous communication materials such as ads, brochures, or product samples. Many IEC programs *incorporate a Communication Message Strategy Outline* like the sample on page 27 into their Agency Brief to give bidders guidance for developing their proposals. A complete example follows on page 26.

Be clear and specific. A good Agency Brief is clearly written and well-organized. It contains a *detailed scope of work* and lists the specific tasks, activities, and deliverables (finished products such as ads, brochures, or posters) that the agency must address in its proposal. Finally, a good brief *summarizes all of the requirements for submitting a responsive proposal*, explains the bidding process so that all of the agencies understand the "rules of the game," and provides the evaluation criteria on which proposals will be judged. (See Develop Your Proposal Scoring Criteria in Step 4 on page 35 for guidance.)

Provide program assumptions and parameters. Give the agencies a set of program assumptions and parameters to guide them in preparing their proposals. For example, give them information about the time frame for the contract or the scope of the campaign (e.g., national or regional). That way, they will propose strategies and approaches that are realistic and possible to implement.

Do not leave the agencies in the dark about your budget. Give the agencies a *hypothetical but realistic budget* within which to develop their proposals. Ask them to propose how they will allocate this budget across the communication activities and tasks in the scope of work. Also, ask them to provide a justification for their recommendations.

Evaluate agencies' cost proposals based on a uniform set of cost estimates. To evaluate the agencies' costs, ask them to provide cost estimates for producing several typical communication products with clearly defined specifications (e.g., a TV ad, a radio ad, a poster, etc.). Request a breakdown of costs for producing each item such as the agency's production costs, external production costs, standard mark-ups, taxes, etc. *This will give you a set of cost proposals that will be easier to compare and evaluate.* See the example on Step 4 page 42 for additional guidance on developing this section of your Agency Brief.

Include information about the type of contract you will be negotiating. To avoid any misunderstandings during contract negotiations with the winning agency, let the bidders know what type of contract you are planning to negotiate when hiring the agency. *Refer to Chapter 3 for guidance on selecting the appropriate contracting mechanism* and discuss this issue with your financial and administrative department before you complete the Agency Brief.

Reward the agencies for developing initial creative approaches. Asking the agencies to prepare initial creative ideas, such as artwork for logos or posters and scripts for television or radio ads, is essential for seeing how the agencies apply a communication strategy in their creative work. The agencies will need to spend time and possibly incur out-of-pocket expenses to be responsive to your request. It is customary in many countries to pay the agencies a small fee in return for this effort during the bidding process. In your Agency Brief, let the agencies know that you will be paying a fee to the top three finalists for their creative ideas and indicate what amount that fee will be. By paying the agencies, you are giving them an incentive to prepare their best possible proposals.

SAMPLE

Agency Brief Contents

I. Introduction

- Briefly describe your project and your communication needs.
- Briefly describe the funding agency (if different from your organization).
- Provide a brief overview of the bidding process (include timetable, due dates, name of key contact person, and phone number).

II. Background

- Provide essential background information on your program and the communication problem to be addressed.
- Give an overview and samples of your current Information, Education, and Communication (IEC) activities.

III. Scope of Work

- State your overall program goal.
- Provide a 1-page Communication Message Strategy Outline (see sample form on page 27).
- Give program parameters and assumptions to guide proposal development (e.g., national v. regional campaign, length of contract, hypothetical budget).
- Describe the agency's role and responsibilities.
- List tasks the agency will perform.

IV. Deliverables

- List, by task, the specific deliverables you know you will absolutely need in your program and the potential quantities (e.g., 5,000 2-color posters, 4 TV ads, and 8 radio ads). (This information will help agencies allocate the hypothetical budget even though it may not ultimately correspond to your final program.)

V. Bidding and Proposal Review Process

- Provide Bidders' Conference information, if applicable (give date, time, and location).
- Specify procedures for submitting questions.
- Describe procedures for evaluating the winning agency.
- Describe procedures for notification of final outcome and contract negotiations following the selection of the winning agency.

VI. Evaluation Criteria

- List evaluation criteria and number of points each is worth—include both technical and cost proposal values. (See Develop Your Proposal Scoring Criteria on page 35 for guidance.).

SAMPLE

Agency Brief Contents (continued)

VII. Terms of the Contract

- Describe type of contract to be awarded and mechanism for negotiation. (Be sure to read Chapter 3 for guidance on this issue.)

VIII. Requirements for Responsive Proposals

- In this section, list what the agencies must include in their proposals to be responsive. This may include:

A. Technical Proposal

1. Description of agency capabilities and experience related to this account (Brief version of capabilities questionnaire data)
2. Proposed Staff
   - Staff members who will be assigned to this account (percent of time, if relevant)
   - Description of staff experience
   - How the account team will manage this account
3. Strategic Thinking and Technical Approach
   - Agency's understanding of the communication problem to be addressed
   - Description of agency's approach to implementing the Scope of Work, including their proposed communication strategy and approach to each task
4. Initial Creative Ideas (if appropriate for your selection process)
   - Agency's initial creative ideas for a limited number of deliverables (e.g., rough designs for a program logo, or a suggested campaign theme, or a scenario and script for a television ad, or a sample script for a radio ad)
5. Sample Media Plan and Schedule (if applicable for your selection process)
   - Draft media plan describing what media will be used, how often, when, and why
6. Proposed Timetable for Completing the Scope of Work
7. Description of the Agency's Allocation of the Hypothetical Budget

B. Cost Proposal

- List a set of typical communication products or deliverables (e.g., a TV ad, brochures, posters) and provide production specifications.
- Ask the agencies to submit cost estimates for creating and producing each item.
- Request budget justification for producing each item, including breakdowns of all costs such as the agency's design fees and production costs, external production costs, printing costs, standard mark-ups, taxes, etc.

C. Client References (at least three)

- Ask the agencies for a list of references, including client contact names, addresses, telephone numbers, and main type of services the agency provides each client.

IX. Proposal Submission Requirements

- Due date, time, name of contact person, and address for submitting proposals
- Number of copies required (this should equal the number of reviewers plus one extra for your files)
- Language requirement(s) (your country's language, English, or both)

How To Request Cost Estimates from the Agencies

For cost comparisons and eventual contract negotiations, ask the agencies to submit realistic and comprehensive cost estimates for producing a set of mass media campaign deliverables. Ask the agencies to provide cost estimates with sufficient information and justification. Agencies should include and itemize: 1) labor estimates, if applicable; 2) direct production costs; and 3) all standard indirect "mark-ups" in their cost estimates.

Agencies should disclose their company policies regarding standard commissionable and non-commissionable items, including media, production, expenses, and other cost data.

Indicate that agencies will be held to their submitted individual unit cost estimates when negotiating the final contract. See the example below for specifications for a set of typical deliverables.

EXAMPLE

Request for Cost Estimates from an Agency Brief

UNIT COST ESTIMATES

1. 500 Plastic Signs

Include: Design prototype and final artwork, mechanical production to camera-ready (or disk ready if on DTP) and printing.

Size: 3 x 3 feet

Colors: Two-color

Artwork: Logo illustration

Labor cost for production up to camera-ready/disk-ready:____________

Printing: 500 plastic signs

Printing Cost for 500 Plastic Signs: ____________

2. One Television Advertisement

Include: Concept development, copywriting, development of prototype animatic/photomatic for pretesting, all production (pre/post) up to final ready-for-airing spot.

Length: 60 seconds

Format: On location; drama style presentation; minimal props; no special effects; some titles and artwork to be added in post-production; shot on Beta SP

Talent: Three principals on camera; one voice-over announcer

Copies: Two tapes for broadcast; two video cassettes for non-broadcast viewing

Total Production Costs:____________

3. One Radio Advertisement

Include: Concept development, copywriting, development of rough spot for pretesting, all production up to final ready-for-airing spot.

Length: 60 seconds

Format: Dramatic dialogue with composed, original jingle/music

Talent: Two principals voices; one voice-over announcer

Copies: Three tapes for broadcast; two audio cassettes for non-broadcast listening

Total Production Costs:____________

4. One Newspaper Ad

Include: Concept development, copywriting, development of prototype for pretesting, mechanical production to camera-ready (or disk-ready if on DTO) and printing.

Size: ½ page

Colors: Black and White

Artwork: Illustration

Labor cost for production up to camera-ready/disk-ready:____________

5. 50,000 Campaign Posters

Include: Concept development, copywriting, development of prototype for pretesting, mechanical production to camera-ready (or disk-ready if on DTP) and printing.

Size: 30 inches x 20 inches

Colors: Four-color process color

Artwork: Illustration

Stock: Coated, good quality poster stock

Labor cost for production up to camera-ready/disk-ready:____________

How To Use the Communication Message Strategy Outline

The Communication Message Strategy Outline on page 27 can be used in two ways. You may complete it to provide strategic direction to the agencies (see example below) and to assess how each bidder follows a strategy. Or you can leave it blank for the bidders to complete. That way you can assess their strategic thinking capabilities and see how carefully they follow their own strategy. Either way, this outline forces sharper direction and clearer comparisons of the agencies' proposals. Including this outline in the Agency Brief also emphasizes the importance you place on "strategy" before executing communication messages.

EXAMPLE Communication Message Strategy Outline

Project Name: Ukraine Adolescent Video Project

Statement of the Communication Problem To Be Addressed:
Teenagers in Ukraine lack sufficient information about sexual responsibility, abstinence, and safe methods of contraception and do not know where to go to get accurate information.

Communication Objectives:
1. To increase sexual responsibility among adolescents by giving them knowledge on the benefits of either abstinence or correct use of contraception.
2. To educate adolescents on all contraceptives, with emphasis on condoms, oral contraceptives, and calendar method.

Primary Audience:
Boys and girls age 12-16

Demographic Characteristics:
- Living in: Kiev, Donetsk, Odessa, Lviv
- Speaking either Russian or Ukrainian
- Attending school
- Living in families with average income

Psychographic Characteristics:
- Striving for independence
- Planning for the future
- Awakening sensuality

Key Message/Promise/Benefit:
If you are sexually responsible, you will be able to realize your potential.

Main Support Points:
1. You will be independent.
2. You will realize your plans for the future.
3. You will demonstrate your maturity.
4. You will be modern.
5. You will be a role model.

Desired Action Response:
To encourage the viewer to seek more information from a doctor or a family planning center.

Communication Message Strategy Outline

Project Name: ____________________

Statement of the Communication Problem To Be Addressed: ____________________

Communication Objectives: ____________________

Primary Audience (List Demographic and Psychographic Characteristics): ____________________

Key Message/Promise/Benefit: ____________________

Main Support Points: ____________________

Desired Action Response: ____________________

Step 2.

Conduct a Bidders Conference (If Required)

To avoid any bias and maintain the fairness of the competition, some funders or government agencies may require that a Bidders Conference be held shortly after distribution of the Agency Brief. If you are required or decide to conduct a Bidders Conference, use the checklist on page 30 to help you plan and conduct your meeting.

The purpose of the Bidders Conference is to answer any questions that the agencies may have about the Agency Brief and the agency selection process. In addition, the Bidders Conference is an opportunity to make sure the agencies understand your program, your communication needs, and the nature of the partnership you are seeking with an ad agency.

The Bidders Conference should be set up within 1 week after the agencies receive the Agency Brief. In your Agency Brief, ask the agencies to submit written questions in advance of the Bidders Conference so that you may address their concerns at the meeting. In addition, allow agencies to ask any additional questions during the Conference.

It is not mandatory that agencies attend the Bidders Conference, but it does make a statement about their level of interest if they ignore it.

At the conference, you may want to include other presenters. If you do, make sure they are knowledgeable about the program so that they can be helpful to the participants. (Be careful. The presence of a high official who is not immediately involved in the program could deter some participants from asking meaningful questions.)

Once the meeting is over, a written summary of the questions and the accompanying answers should be sent to all of the agencies on your short list, whether or not they attended the conference. At this point, you should avoid any future communication with the bidders until after the proposals are submitted.

Guidelines for Maintaining a Fair Competition

Regarding Communication with the Bidders:

Limit communication with prospective bidders. To avoid any appearance of bias, it is best to limit communication to written questions and answers that are shared with all of the bidders. It is also a good idea to set a deadline for receiving the agencies' questions and to make it clear that after that date, no more questions will be entertained.

Cut off all communication following the Bidders Conference. If you will be conducting a Bidders Conference, indicate in your Agency Brief that all questions should be submitted in writing at least 2 days before the meeting. Inform the agencies that their questions will be addressed at the Bidders Conference. It is generally considered most equitable to limit all inquiries to the Bidders Conference and to refuse to discuss the Agency Brief following that meeting.

Bidders Conference Checklist

Before the Conference:

- ❑ Include a written notice in the Agency Brief inviting all agencies to attend the Bidders Conference.
- ❑ Select a meeting room that is large enough and has ample seating to accommodate two to three people from each agency.
- ❑ Request that bidders send in their questions at least 2 days before the conference.
- ❑ Prepare your responses before the conference.
- ❑ Create a sign-in sheet for attendees.
- ❑ Arrange for a tape recorder or note taker to record all of the questions and answers discussed at the conference.

At the Conference:

- ❑ Ask all participants to sign in when entering the room so that you have a complete list of attendee names, addresses, telephone and fax numbers (and e-mail addresses, if available).
- ❑ Provide a brief overview of your program, explain your communication objectives, your Scope of Work, and describe the nature of the partnership you are seeking with an ad agency.
- ❑ Review the written questions and provide responses.
- ❑ Allow all participants to ask additional questions.
- ❑ Have all participants identify themselves before asking questions.
- ❑ Try to answer all the questions raised. If you do not know the answer at the meeting, promise to send the answer in writing.

After the Conference:

- ❑ Send a write-up of the questions and answers to all attendees and non-attendees in a prompt manner.

Step 3.

Select the Proposal Review Committee

In conjunction with preparing the Agency Brief, you will want to establish your Proposal Review Committee. This committee will be charged with reviewing the agencies' proposals and selecting the winning agency.

The committee should be comprised of four to six people (including the person in charge of the selection process) who know enough about advertising and communication to evaluate the proposals. It should also include a representative from other organizations that are involved with the project. Where do you find candidates for the committee? Consider the following:

- People within your organization who have worked with advertising agencies in the past and/or top managers who will be involved with the communication campaign.
- People at other organizations like yours who have worked with advertising agencies.
- People who work for the donor organization, the Ministry of Health, or other key organizations.
- People who work in the private sector who are concerned about your program and who have experience working with advertising agencies.
- People at universities or research centers who understand the role of advertising and communication in fostering behavior change.
- People who have no formal or informal association with any of the competing agencies or members of their staffs.

When contacting potential reviewers, you will need to explain what their duties will be and how much time will be required of them. It is up to each member of this committee to:

- Review and score each proposal;
- Attend a committee meeting to discuss the proposals and their scores;
- Meet with the finalists; and
- Help select the winning agency.

Depending on the number of proposals and their length, it could take up to 1 full day to review proposals, up to 1 day to meet with the full committee to discuss and compare scores, and 1 to 2 days to meet with the finalists and to select the winning agency. To be safe, expect a commitment of at least 3 days.

Use the checklist on page 33 in selecting your committee members. Once you have identified the right candidates, be sure to obtain top management's approval of the committee members you have selected. Also, make sure that the committee's recommendations will be accepted by top management.

After you have selected your committee members, send them copies of the Agency Brief, the schedule of the review process, and a letter confirming their participation. Once you receive the bidders' proposals, send them a complete set of proposals, a proposal review checklist, and a set of evaluation score sheets (see Step 4).

EXAMPLE In Bangladesh, one of the IEC staff members on the family planning project had just been hired away from one of the local ad agencies. His former company was one of several agencies invited to bid on a major campaign. While this person was extremely qualified to sit on the Review Committee, his participation in the bidding process could easily give an impression of creating an unfair competition. If his former agency had won, the losers could have grounds for crying foul, even though the process was fair.

To maintain the integrity of the selection process, we made sure this staff member did not play a voting role. We made good use of his expertise of the advertising agency industry, and he was invited to sit in on some of the discussions among the Review Committee members. He was not allowed, however, to score an agency proposal or vote at any time.

As it turned out, the competition was very close and came down to two finalists. The IEC staff member's former agency ultimately came in a close but unanimous second place. Despite his strong loyalty to his former company, this staff member agreed with the Review Committee's decision. This result confirmed the fairness of the competitive bidding process.

Guidelines for Maintaining a Fair Competition

When Selecting the Proposal Review Committee:

- **Select neutral members.** No committee members should be aligned with any of the competing agencies or be close friends of members of their staff.
- **Avoid biases.** No committee members should have biases for or against any particular ad agencies.
- **Keep agency names confidential.** If possible, do not divulge to committee members which agencies are competing until you send them the proposals. If concerned, you should also attempt to conceal the names of the Proposal Review Committee members from the competing agencies.

Checklist for Selecting Proposal Review Committee Members

Candidate's Name: ______________________

Organization: ______________________

Address: ______________________

____

Telephone Number: ______________________

Fax Number (if available): ______________________

Is this candidate:

- ❑ Available to review all proposals, to meet with the other committee members to review their scores, and to meet with the finalists?
- ❑ Independent and not aligned or close friends with any of the competing advertising agencies?
- ❑ Familiar or experienced with the advertising agency business?
- ❑ Knowledgeable about advertising and communication strategies, with some experience in our program area?
- ❑ Knowledgeable about our program and what we are trying to accomplish?
- ❑ Supportive of our program and its use of advertising?

This candidate:

- ❑ Meets the criteria for serving on the committee.
- ❑ Has agreed to serve on the committee.

Step 4.

Review and Score the Agency Proposals

To prepare for this step in the selection process, you will need to develop four essential tools:

1. **Proposal Scoring Criteria**
2. **Proposal Review Guidelines for reviewers**
3. **Technical and Cost Score Sheets**
4. **Summary Score Charts.**

Instructions for developing each of these items is described in this section. You will find, however, that your scoring criteria must be developed at the same time that you are drafting your Agency Brief so that you can inform bidders of these criteria. The Proposal Review Guidelines, Score Sheets, and Summary Score Charts for reviewers should be developed and finalized right after you have sent out your Agency Brief.

As soon as you receive the agencies' proposals, send a complete set of proposals and evaluation tools to each member of your Proposal Review Committee. Give the reviewers up to 1 week to review the proposals and to get ready for the committee meeting.

You may find that the agencies have sent only one copy of their initial creative ideas for art work or sample scripts or scenarios for television and radio ads. If you are unable to duplicate them, inform reviewers that they will have the opportunity to review, evaluate, and score the creative ideas at the committee meeting.

4.1 Develop Your Proposal Scoring Criteria

You will need to develop your proposal scoring criteria when you draft the Agency Brief because you will need to include this information for the bidders. The scoring criteria described in this chapter have been used in numerous ad agency competitions in the developing world. They also are designed for evaluating the type of proposals requested in the Agency Brief outlined earlier.

The first step is to decide what evaluation criteria you will use for scoring the technical proposals. The example used in this chapter includes the following criteria:

- Agency background and experience.
- Agency staff and management plan.
- Strategic thinking and technical approach.
- Initial creative ideas.
- Sample media plan.
- Timetable and allocation of the hypothetical budget.
- Overall quality of the proposal.

Technical Proposal Criteria

Design your technical proposal scoring criteria to give greater weight to the more important items such as Strategic Thinking and Approach (25 points) or Initial Creative Ideas (20 points). Give lesser weight to items such as the Agency Background (10 points) or the Timetable and Allocation of the Hypothetical Budget (10 points). See the Technical Proposal Score Sheet on page 40 for an example of a complete set of evaluation criteria and how to allocate score points. You may need to adapt this example to reflect the proposal requirements in your Agency Brief.

To simplify scoring of the *technical* proposals, have the evaluation criteria add up to a total of 100 points. It is easier to compare all of the bidders' scores when they are based on a total possible score of 100 points. Also, it is easier for the reviewers to allocate score points for each criterion when the total adds up to 100 points.

Cost Proposal Criteria

To make it easier to evaluate and compare the agencies' costs, the total *cost proposal score* should be based on rating the agencies' cost estimates for the same set of advertising products (e.g., a TV ad, a radio ad, a poster, a logo, etc.). A good guideline is to give each item a total possible score of 5 and multiply that by the number of items to get the total score. For example, if you have requested agency costs for five different items, the total possible score for the cost proposal would be 25.

In the example presented here, the combined total possible score for the technical and cost proposals is 125, with the technical score counting for 80 percent of the total and the cost proposal for 20 percent. This allocation is recommended for evaluating agency proposals because it puts the emphasis on the *quality of the technical proposal,* the most important consideration in selecting the best agency partner for your program.

4.2 Develop Your Proposal Review Guidelines (for Reviewers)

To guide the reviewers in their evaluations of each proposal, develop a set of Proposal Review Guidelines. The guidelines should lay out the procedures each reviewer should follow for completing a thorough reading and assessment of the agency proposals. (See Overall Proposal Review Guidelines on page 37.)

Each reviewer should work independently to review the proposals, without any discussion among committee members. Reviewers should be encouraged to refer to the Agency Brief while they review the proposals. They will also find it helpful to jot down notes about key points and approaches related to the evaluation criteria—right on the proposals.

What factors should reviewers consider in scoring the agency proposals?

To guide reviewers in assessing the technical and cost proposals, include a set of guidelines or questions like the ones provided on pages 39 and 42. These questions are designed to:

- Focus the reviewers on the key points to look for in each proposal;
- Give guidance for assessing the quality of the ideas and approaches being proposed; and
- Ensure that each reviewer uses a consistent set of guidelines in scoring the proposals.

Be sure to remind reviewers to bring all of the proposals and evaluation tools to the Review Committee meeting. Include the date, time, and location of the meeting in the guidelines.

Guidelines for Maintaining a Fair Competition

When Reviewing and Scoring the Agency Proposals:

- **Reviewers should review the proposals independently.** Instruct the reviewers not to discuss the agency proposals with each other before the committee meeting so that they formulate their own independent evaluation scores.
- **The review process must remain strictly confidential.** Instruct the reviewers not to discuss the proposals or any aspect of the review process with anyone but you or the person heading up the selection process.
- **Eliminate any biased reviewers.** If any reviewer bias that would jeopardize the competition emerges during the review process, eliminate the reviewer from the committee.
- **Maintain strict confidentiality.** Make it clear that you—or the person heading up the selection process—should be the only source of communication with the agencies and the reviewers throughout the process. All inquiries about the Agency Brief or the agencies' proposals should be referred to the person heading up the selection process—without comment by anyone else.

  This policy is especially important when it is time to inform the winning agency. There should be no leaks before the official announcement is made and no secondhand reports to the losing agencies. It is important to maintain communication control at all times.

Overall Proposal Review Guidelines

- Give yourself enough time to review each proposal.
- Have a copy of the Agency Brief handy while reviewing the proposals.
- Take notes during your review so that you can refer to them when scoring the proposal. It may be helpful to actually write in the margins of each proposal.
- Use the guideline questions to help formulate your scores on each evaluation criterion.
- Assess each proposal on the quality, rather than the quantity, of the response.
- Provide a justification for your ratings on the Technical and Cost Proposal Score Sheets.
- Be sure to evaluate and score each of the cost estimates provided for the cost proposal.
- As you complete each Score Sheet, fill in your ratings for each agency on the Summary Score Chart to see how the proposals compare with each other overall and on each evaluation criterion.
- Be ready to meet with the Proposal Review Committee on (date/time/location).
- Bring the Agency Brief, all of the proposals, your completed Score Sheets, Summary Score Chart, and your notes to the committee meeting.

4.3 Prepare the Technical and Cost Proposal Score Sheets

Prepare two score sheets for reviewers: one for the technical proposals and one for the cost proposals. The score sheets should list all of the evaluation criteria, the number of points each is worth, and a blank space for the reviewer to enter his or her score and justification. Every score sheet should include the reviewers' reasons for giving each agency a particular score, as illustrated in the example of a filled-in score sheet on page 41. This information will be discussed at the Proposal Review Committee meeting and will be critical for justifying your selection of the winning agency.

Reviewers must fill out a Technical and a Cost Proposal Score Sheet for each agency's proposal. Be sure to send reviewers enough score sheets for all of the agency proposals. Use the sample score sheets on pages 40 and 43 as a guide for developing your own version.

NOTE: The evaluation criteria and scoring system presented here are for illustration only. Feel free to determine your own criteria and assign values according to your program priorities.

Guidelines for Reviewing the Technical Proposal

Agency Background and Experience (10 points)

- How much and what kind of experience does the agency have working on issues related to this account?
- How well does the agency's background and experience correspond to the scope of work described in the Agency Brief?

Agency Staff and Management Approach (15 points)

- How experienced are the staff members being proposed to work on this account?
- Do they have direct experience related to this scope of work and with the intended audiences?
- Are the staff members being appropriately assigned for their roles?
- Have they worked with the agency for a long time or are they relatively new?
- Does the agency offer an effective approach for managing the account?

Strategic Thinking and Approach (25 points)

- How responsive is the agency's approach to the requirements outlined in the Agency Brief?
- How well did the agency understand the scope of work?
- How well does the approach address the communication problem described in the Agency Brief?
- Can this approach realistically be executed?
- How effective is the proposed communication strategy?
- What, if any, innovative ideas and approaches did they present?
- What steps will they take in developing the communication campaign and how will they do it?

Initial Creative Ideas (20 points)

- Do the creative ideas correspond to the communication message strategy in the Agency Brief or the one submitted in the proposal?
- Do these ideas meet **the JHU/PCS 7C's for Effective Communication?**
  - Do they **Command** attention?
  - Do they **Clearly** communicate the intended message?
  - Do they **Communicate** a meaningful benefit?
  - Are the creative ideas **Consistent** with each other?
  - Do they **Cater** or appeal to the audience's heart and head?
  - Do they **Create** trust?
  - Do they include a **Call** to action?
- Do they reflect quality work?
- Do they demonstrate real initiative on the part of the agency?
- How well do the creative ideas work as a campaign?
- How suitable is each element for the recommended medium and intended audience (e.g., words for illiterates, complexity of scripts for radio, visuals for TV or posters, etc.)?

Sample Media Plan and Schedule (10 points)

- How complete and well thought out is the media plan?
- How appropriate are the media selected for reaching the intended audience?
- Has the media schedule been allocated in appropriate proportions given the total budget? Are the various media elements scheduled in a logical fashion?
- Has the agency provided a good rationale for its media selection decisions?

Timetable and Allocation of the Hypothetical Budget (10 points)

- How complete and well thought out is the timetable for implementation?
- How realistic is the implementation plan?
- How well does the timetable take into consideration production time, closing dates for placing ads, and other deadlines?
- How well thought out and realistic is the agency's allocation of the hypothetical budget?
- Will the emphasis in spending maximize the communication campaign's results?
- Does the budget allocation reflect the deliverables required in the Agency Brief?
- What rationale did the agency provide for its allocation of resources?

Overall Quality of the Proposal (10 points)

- Was the proposal logical, consistent, and cohesive?
- Was the proposal comprehensive and detailed adequately?
- Was the overall approach reasonable, innovative, and effective?
- Was the proposal presented in a professional manner? Was it neat? well-organized? free of spelling, grammatical, and typing errors?

Technical Proposal Score Sheet

Date of Review: ______________ **Name of Agency:** ______________

Name of Reviewer: ______________

Technical Proposal Scores

[ ] **Agency background and experience (10 points)**

Justification: ______________

[ ] **Agency staff and management approach (15 points)**

Justification: ______________

[ ] **Strategic thinking and approach (25 points)**

Justification: ______________

[ ] **Initial creative ideas (20 points)**

Justification: ______________

[ ] **Sample media plan (10 points)**

Justification: ______________

[ ] **Timetable and allocation of hypothetical budget (10 points)**

Justification: ______________

[ ] **Overall quality of the proposal (10 points)**

Justification: ______________

[ ] **TOTAL TECHNICAL PROPOSAL SCORE (out of 100 points)**

Additional Comments: ______________

Chapter 2

EXAMPLE Technical Proposal Score Sheet

Date: June 7, 1996 **Name of Agency: Agency 1**
Name of Reviewer: Lydia Smith

Technical Proposal Scores

9.75 **Agency background and experience (10 points)**

Justification: Agency 1 is a full-service advertising and PR agency with considerable PR experience. Previous clients have provided direct experience in both Government family planning activities and pharmaceutical products. Successful experience with new product introductions, which involve distribution, point-of-sale merchandising, and mass media provide solid credentials.

13.50 **Agency Staff and management approach (15 points)**

Justification: Key personnel have considerable experience and relevant backgrounds. Mr. Z. has very strong credentials. Media and Creative Directors have 12 years of experience. The Account Supervisor, AV Producer, and Business Development Staff have less than 5 years' experience in the communications business. Proposal does not clearly delineate roles and responsibilities of staff related to the scope of work. (Titles provide some insights into areas of responsibility.) Will need further clarification.

21.00 **Strategic thinking and approach (25 points)**

Justification: Agency approach includes several strong ideas related to program implementation. It lacks specifics in terms of the planning process, development of the over-riding marketing plan, and the steps the agency will take in developing and managing the program. (The agency does mention going out to the field to get firsthand experience in pharmacies, prior to developing final creative concepts/copy.) Strategic emphasis on the pharmacy-physician partnership may be too broad and may need to be refined to focus the partnership more on family planning. Some good PR ideas.

16.25 **Initial creative ideas (20 points)**

Justification: Considerable effort was made in generating creative ideas, demonstrating good creative capability. While demonstrating originality in thinking, some of the creative ideas may require further refinement and/or redirection. For example, the logo symbol is nicely conceived and rendered, but will people understand the knocking fist? How will it be described quickly on radio? TV scenarios include a scheme of seven different spots, but the Brief only calls for four TV spots. How is this inconsistency explained? Radio script is straightforward, but it lacks real personality. Emphasis is perhaps too much on the *why* of family planning rather than the *where*, which ties in to the program pharmacies/doctors.

7.00 **Sample media plan (10 points)**

Justification: Media plan includes overall approach, but it lacks specific details. For example: 1) What are the relative weights of spots across the different stations? 2) What time periods and programs will be selected and why? 3) How will spots be scheduled in their flights? Is the schedule flat or are their peaks based on target audience reach? Media plans for outdoor billboards and posters were missing.

7.50 **Timetable and allocation of hypothetical budget (10 points)**

Justification: Timetable and implementation plan was developed specifically to support agency approach, but it lacked components and had many inconsistencies. Brief states a 2-year program period, but timetable and implementation plan is scheduled for 16 months. Budget allocations across task are included, but information is sometimes confusing and inconsistent. The allocation for monitoring activities appears high (465 days). Likewise, the time allocations for the development of materials seem light (5 days to write eight counseling materials.) When these are matched with the budget allocation information, the information presented is confusing. Will need to get further clarification.

7.50 **Quality of the Proposal (10 points)**

Justification: A well-organized, clearly written, responsive proposal that includes considerable original thinking in the creative sections. However, several sections include incomplete or inconsistent information that will require clarification. Response deemed technically acceptable.

82.50 **Total Technical Proposal Score (out of 100 points)**

Chapter 2

Guidelines for Reviewing the Cost Proposals

- Did the agency provide cost estimates for all of the items requested in the Agency Brief?
- Are all the items priced out according to the specifications in the Brief?
- Are the agency commissions or mark-ups included in the cost estimates?
- Are the costs broken out between internal costs and external costs?
- How realistic are these costs?
  Do they appear unreasonably high?
  Do they appear too low?
- Assuming costs provided are complete and realistic, give the lowest cost estimates the highest scores and give the highest cost estimates the lowest scores.

EXAMPLE Cost Proposal Score Sheet

Date: June 7, 1996 **Name of Agency:** Agency 1

Name of Reviewer: Lydia Smith

Cost Proposal Scores

[1] **Item 1: 500 Plastic Signs**
Justification: Agency did not follow specifications provided in the Agency Brief. Cost estimate included back lighting and electric fixtures—items that were not required. As a result, Agency 1's estimate is much higher than the others, and its score is much lower. If cost proposal scores are close, ask Agency 1 to re-estimate their costs based on the correct specifications.

[5] **Item 2: One Television Announcement**
Justification: Agency 1's estimate incorporates all of the specifications in the Brief. Estimate is fully itemized, with clearly presented internal and external production costs. This is the lowest cost estimate for a TV ad among the group. There is a small difference between this estimate and the next closest estimate, but both of these are significantly lower than Agency 3's estimate.

[4] **Item 3: One Radio Advertisement**
Justification: Agency 1's cost estimate met the specifications in the Brief. They have provided a good, detailed budget. The talent and music costs seemed high compared with other agencies' bids, but their studio production costs were low. Their estimate is in the middle range of a fairly tight spread.

[1] **Item 4: One Newspaper Ad**
Justification: Most expensive estimate; higher than other bids by 20 percent.

[3] **Item 5: 50,000 Campaign Posters**
Justification: Production costs provided according to specifications. Unclear whether printing costs include mark-up. Printing costs are 15 percent higher than other estimates. May need clarification from the agency. Cost estimate is in the middle compared with other agency estimates.

[14] **Total Cost Proposal Score (out of 25 points)**

Additional Comments: Agency 1 seemed to understand some production cost requests better than others. This agency's technical score is highest; one needs to ensure that the agency fully understands the scope of work before beginning any projects. Also, need to get more clarification on newspaper ads and printing estimates.

Cost Proposal Score Sheet

Date of Review: ____________ **Name of Agency:** ____________

Name of Reviewer: ____________

Cost Proposal Scores

[ ] **Cost estimate item 1 (5 points)**
Justification: ____________

[ ] **Cost estimate item 2 (5 points)**
Justification: ____________

[ ] **Cost estimate item 3 (5 points)**
Justification: ____________

[ ] **Cost estimate item 4 (5 points)**
Justification: ____________

[ ] **Cost estimate item 5 (5 points)**
Justification: ____________

[ ] **Total Cost Proposal Score (out of 25 points)**

Additional Comments: ____________

4.4 Prepare the Summary Score Chart for Reviewers

The final evaluation tool reviewers will need in scoring the agency proposals is the Summary Score Chart. This chart enables reviewers to see at a glance the scores they have given each agency, to compare the scores, and to make any adjustments based on the strengths and weaknesses they have noted for each proposal evaluation criterion.

Using the sample Summary Score Chart below as a guide, prepare your own chart. List the technical and cost proposal criteria and the total possible score for each criterion down one column of the chart. Then create a column for each agency proposal, filling in the agency name at the top of each column. The sample chart is designed for scoring three agency proposals. You will need to adapt the chart to reflect your scoring system and the number of agency proposals you receive.

Summary Score Chart for Reviewers

Reviewer Name: ______________________________

Date of Review: ______________________________

Evaluation Criteria	Agency:	Agency:	Agency:
Technical Proposal (Total 100 points)			
Agency Background (10 points)			
Agency Staff and Experience (15 points)			
Strategic Thinking and Approach (25 points)			
Initial Creative Ideas (20 points)			
Sample Media Plan (10 points)			
Timetable and Budget Allocation (10 points)			
Overall Quality (10 points)			
Total Technical Score (100 points)			
Cost Proposal (Total 25 points)			
Item 1 (5)			
Item 2 (5)			
Item 3 (5)			
Item 4 (5)			
Item 5 (5)			
Total Cost Score (25 points)			
Total Technical and Cost Score (125 points)			

Step 5.

Convene the Proposal Review Committee

To keep the Proposal Review Committee meeting on track, develop an agenda that lays out the review procedures and the schedule. That way, you can move the meeting along and be sure to complete the review process.

Also, be sure to ask one of the committee members (or invite a staff person) to take notes on the review process and each reviewer's justifications throughout the meeting. You may need these notes for documenting the selection process.

5.1 Review and Score the Creative Ideas (If Necessary)

If committee members were not able to review the agencies' initial creative ideas, start the meeting by showing these items. Give reviewers enough time to complete the Evaluation Score Sheets and to write their scoring justifications.

5.2 Discuss and Tabulate the Technical Proposal Scores

Now you are ready to gather and tabulate the committee's scores for each agency's technical proposal. Create a large chart like the sample Review Committee Score Chart on page 46. Start with the first agency on your chart and call on the reviewers to report the evaluation scores and justifications they gave for each criterion, one at a time. Enter each score on the chart and allow time for discussion. Repeat this process for each agency.

After you have collected all the technical proposal scores, add them up. Calculate the average score on each criterion by dividing the total score by the number of reviewers.

As you can see in the example on page 47, reviewers can be rather consistent with each other in scoring agency proposals. In this example of an agency evaluation review, two of the three agencies were rated much higher than the third, their scores were very close, and they fell within a narrow range of each other.

The third agency was so far behind on the technical proposal that reviewers did not even consider its cost proposal. A reasonable guideline would be to eliminate those agencies whose technical scores are significantly lower than the other competitors, and whose technical proposals clearly show a weak response across the board.

Review Committee Score Chart
Technical Proposal - 100 Points

	Reviewer:	Reviewer:	Reviewer:	Reviewer:	Totals	Average
Agency:						
A. Background (10)						
B. Staff (15)						
C. Approach (25)						
D. Creative (20)						
E. Sample Plan (10)						
F. Timetable and Budget (10)						
G. Overall Quality (10)						
Totals (100)						
Agency:						
A. Background (10)						
B. Staff (15)						
C. Approach (25)						
D. Creative (20)						
E. Sample Plan (10)						
F. Timetable and Budget (10)						
G. Overall Quality (10)						
Totals (100)						
Agency:						
A. Background (10)						
B. Staff (15)						
C. Approach (25)						
D. Creative (20)						
E. Sample Plan (10)						
F. Timetable and Budget (10)						
G. Overall Quality (10)						
Totals (100)						

Review Committee Score Chart
Technical Proposal - 100 Points

EXAMPLE

	Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4	Totals	Average
Agency 1						
A. Background (10)	10	9	7	9	35	8.75
B. Staff (15)	13	12	10	13	48	12.00
C. Approach (25)	21	19	20	21	81	20.25
D. Creative (20)	16	14	18	18	66	16.50
E. Sample Plan (10)	9	10	9	8	36	9.00
F. Timetable and Budget (10)	9	8	7	7	31	7.75
G. Overall Quality (10)	9	8	8	9	34	8.50
Totals (100)	**87**	**80**	**79**	**85**	**331**	**82.75**
Agency 2						
A. Background (10)	8	9	6	8	31	7.75
B. Staff (15)	13	12	10	0	35	8.75
C. Approach (25)	13	12	10	10	45	11.25
D. Creative (20)	8	10	10	5	33	8.25
E. Sample Plan (10)	2	3	0	0	5	1.25
F. Timetable and Budget (10)	0	5	8	8	21	5.25
G. Overall Quality (10)	4	4	5	4	17	4.25
Totals (100)	**48**	**55**	**49**	**35**	**187**	**46.75**
Agency 3						
A. Background (10)	10	10	8	9	37	9.25
B. Staff (15)	13	8	12	12	45	11.25
C. Approach (25)	22	20	18	20	80	20.00
D. Creative (20)	15	16	16	16	63	15.75
E. Sample Plan (10)	8	6	9	8	31	7.75
F. Timetable and Budget (10)	7	4	5	8	24	6.00
G. Overall Quality (10)	9	7	8	8	32	8.00
Totals (100)	**84**	**71**	**76**	**81**	**312**	**78.00**

5.3 Discuss and Tabulate the Cost Proposal Scores

Now you are ready to discuss and tabulate the cost proposals. Create another chart, like the sample on page 49, for entering and tabulating the cost proposal scores. Repeat the same process you used for the technical proposal, focusing only on the agencies you have determined to be in the technically competitive range.

5.4 Calculate the Agencies' Total Scores

Calculate the agencies' total scores by adding each agency's average technical and cost proposal scores. You may find and select a clear winner at this point—an agency with an outstanding technical proposal, brilliant creative ideas, and very reasonable costs. More likely, you will find two or three agencies like the ones on the example that had strong proposals, reasonable costs, and were within the same scoring range. These are your finalists, one of whom will be selected to be your agency partner in the final step of the selection process.

Review Committee Score Chart
Cost Proposal - 25 Points

	Reviewer:	Reviewer:	Reviewer:	Reviewer:	Totals	Average
Agency:						
Item 1 (5)						
Item 2 (5)						
Item 3 (5)						
Item 4 (5)						
Item 5 (5)						
Totals (25)						
Agency:						
Item 1 (5)						
Item 2 (5)						
Item 3 (5)						
Item 4 (5)						
Item 5 (5)						
Totals (25)						
Agency:						
Item 1 (5)						
Item 2 (5)						
Item 3 (5)						
Item 4 (5)						
Item 5 (5)						
Totals (25)						

Chapter 2

Review Committee Score Charts

Total Technical Proposal Scores - 100 Points

AGENCY	Reviewer:	Reviewer:	Reviewer:	Reviewer:	Totals	Average
AGENCY:						
AGENCY:						
AGENCY:						

Total Cost Proposal Scores - 25 Points

AGENCY	Reviewer:	Reviewer:	Reviewer:	Reviewer:	Totals	Average
AGENCY:						
AGENCY:						
AGENCY:						

Total Technical & Cost Proposal Scores - 125 Points

AGENCY	Average Technical Score	Average Cost Score	Total Score
AGENCY:			
AGENCY:			

EXAMPLE Review Committee Score Chart

Cost Proposal - 25 Points

	Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4	Totals	Average
Agency 1						
Item 1 (5)	2	3	2	3	10	2.50
Item 2 (5)	4	5	4	5	18	4.50
Item 3 (5)	4	4	4	5	17	4.25
Item 4 (5)	5	4	4	4	17	4.25
Item 5 (5)	4	4	4	4	16	4.00
Totals (25)	**19**	**20**	**18**	**21**	**78**	**19.50**
Agency 3						
Item 1 (5)	4	5	4	5	18	4.50
Item 2 (5)	5	5	5	5	20	5.00
Item 3 (5)	4	4	3	4	15	3.75
Item 4 (5)	5	5	4	4	18	4.50
Item 5 (5)	4	4	5	4	17	4.25
Totals (25)	**22**	**23**	**21**	**22**	**88**	**22.00**

EXAMPLE Review Committee Score Charts

Total Technical Proposal Scores - 100 Points

AGENCY	Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4	Totals	Average
AGENCY 1	87	80	79	85	331	82.75
AGENCY 3	84	73	76	81	314	78.00

Total Cost Proposal Scores - 25 Points

AGENCY	Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4	Totals	Average
AGENCY 1	19	20	18	21	78	19.5
AGENCY 3	22	23	21	22	88	22.00

Total Technical & Cost Proposal Scores - 125 Points

AGENCY	Average Technical Score	Average Cost Score	Total Score
AGENCY 1	82.75	19.50	102.25
AGENCY 3	78.00	22.00	100.00

Chapter 2

Step 6.

Select the Winning Agency

You have reached the final step in the selection process. You have narrowed your choices to the agencies that have submitted the best technical proposals, creative ideas, and costs. Now is the time for the Proposal Review Committee to meet with each of the finalists to help select your agency partner.

If you have identified one clear winner from the proposal review process, notify the bidders of your selection and document the selection process as described below.

6.1 Meet With the Finalists

Meeting with the finalists will give the Proposal Review Committee members an opportunity to meet the proposed account staff, to see how they present their ideas, and to observe how the agency staff members interact with each other and with your review team. In addition, these meetings are an opportunity for the agencies to put on a professional presentation, to clarify and discuss their ideas with the Review Committee, and to improve their proposal evaluation scores.

Notify the finalists that they have been selected as the most qualified bidders. Request that the proposed account team members attend the meeting and participate in an oral presentation of their proposed approach and creative ideas.

If sections of the finalists' proposals require further clarification, let the agencies know that you will be sending them a copy of the committee's questions. Ask them to be prepared to discuss these questions at the meeting.

The meetings with finalists should be attended by *all members of the Proposal Review Committee and the agencies' proposed account teams.* Whenever possible and assuming all of the agencies are located nearby, try to hold the meetings at the agencies' facilities. That way, you and the Review Committee can get a better feel for the agencies, their people, and what it might be like to work with them. Otherwise, hold the meetings at your office or another neutral location that is convenient for the committee members. If you are hosting the meeting, make sure that appropriate audiovisual equipment is available and in good working order.

Finally, schedule the meetings to take place all on 1 day so that you do not inconvenience your committee members and you can complete the selection process quickly. Each meeting should last about 1½ hours. During the first one-half hour, the agencies should deliver their presentations. The next hour should be spent discussing the agencies' proposals, answering the committee's questions, and clarifying any ideas and issues that need to be addressed.

6.2 Adjust the Finalists' Scores

After the meetings with the finalists, committee members should review their individual scores for each agency and discuss whether any adjustments should be made. For example, due to the enthusiasm and level of professionalism conveyed at the meeting, committee members may want to add points to an agency's staff score. Or if an agency did an outstanding presentation of its approach and clarified key issues, the committee may want to add points to the agency's strategic thinking and approach.

As part of this discussion, the Proposal Review Committee members should consider how they felt on an emotional (or gut) level about each agency and its staff. What was their impression of the account team? Did they like these people? Would they want to work with them? Because personal chemistry is a critical element in a successful working relationship, it can be used as a factor in adjusting the scores related to agency capabilities, staffing and management, and if appropriate, the agency's technical approach.

6.3 Notify the Bidders of Your Selection

Once the committee has made its selection, notify the winning agency first and then notify every agency that submitted a proposal about your choice. (Note: If you have an existing contract with an incumbent agency, they should have been given formal notice that you are terminating your contract or relationship, effective on a specified date. Include any instructions for transition of materials and files to the new agency.)

All proposals should be kept in the strictest confidence. It is inappropriate to share other agency proposals with the winning agency or with any of the competing agencies. Nor is it appropriate to use another agency's ideas or creative materials if they were not selected, unless you discuss this issue and obtain written consent.

Each agency has the right to receive feedback about its proposal. Your feedback will encourage the agencies to respond to future invitations to bid and will enable you to maintain a relationship with all of the agencies. If an agency has come this far in the competitive process, it must be good enough for you to want to work with it in the future. You may even want to schedule a debriefing meeting if an agency requests one.

6.4 Be Prepared To Document the Selection Process

To document the selection process, organize all of the paper work you have collected during the bidding process. Create files for each agency that bid on your account and include their capabilities, proposals, initial creative ideas, and a complete set of the Review Committee's Evaluation Score Sheets. You will need these files to provide the losing agencies with feedback, to respond to any questions about the bidding process, or to document the Review Committee's decision in case there is a protest against your agency selection.

Schedule for Selecting Your Agency Partner

Take action. Set your schedule for selecting your agency partner using this action plan.

Action	Dates	
	Start By:	Complete By:
1. Prepare and distribute the Agency Brief.		
■ Draft the Agency Brief and have other staff members review.		
■ Develop and include your proposal scoring criteria in the brief (see Step 4).		
■ Select and include your contracting mechanism (see Chapter 3).		
■ Obtain consensus and necessary approvals for the Agency Brief.		
■ Finalize the Brief.		
■ Make enough copies to send to prospective bidders.		
■ Check each copy to make sure it is complete.		
■ Write your letter of invitation to bid to accompany the Agency Brief.		
■ Send the letter and the Agency Brief to the agencies on your short list.		
■ Send the Agency Brief to your Proposal Review Committee members (see Step 3).		
■ Send the Agency Brief to key staff members and place a copy in your files.		
2. Conduct the Bidders Conference (if required).		
■ Include the date, time, and location of the Bidders Conference in the Agency Brief.		
■ In your brief, ask the agencies to submit written questions before the conference.		
■ Make all necessary room, sign-in, and tape recording/note taking arrangements.		
■ Prepare your responses to the agency questions.		
■ Prepare other presenters who may be speaking at the conference.		
■ Conduct the Bidders Conference.		
■ Send out write-ups of the conference proceedings to all prospective bidders promptly.		
3. Select the Proposal Review Committee.		
■ Develop a list of prospective reviewers.		
■ Contact the reviewers, determine whether they are qualified, explain their role and responsibilities, and obtain their agreement and commitment to serve on the committee, and especially to attend all meetings.		
■ Obtain any necessary approvals for the composition of the committee.		
■ Send a letter confirming the reviewer's participation and the schedule of activities.		

Schedule for Selecting Your Agency Partner (continued)

Action	Dates	
	Start By:	Complete By:
4. Review and score the agency proposals.		
■ Prepare the Proposal Review Guidelines for reviewers.		
■ Prepare the Technical and Cost Proposal Score Sheets.		
■ Prepare the Summary Score Chart for reviewers.		
■ Send a complete set of proposals, proposal review guidelines, score sheets, and summary score charts to the reviewers.		
■ Review and score your own set of proposals.		
5. Convene the Proposal Review Committee.		
■ Prepare score charts for tabulating the review committee's scores.		
■ Develop a meeting agenda.		
■ Arrange for a meeting note taker.		
■ Conduct the Proposal Review Committee meeting.		
■ Discuss the reviewers' scores and justifications.		
■ Tabulate the technical proposal scores and eliminate the weakest bidders.		
■ Tabulate the cost proposal scores.		
■ Tabulate the total scores and select the winning agency or the top two or three finalists.		
6. Select the winning agency.		
■ Contact the finalists, if necessary, to set up meetings with the Proposal Review Committee.		
■ Send the agencies any questions about their proposals that require clarification.		
■ Conduct the meetings with the finalists.		
■ Review the finalists' presentations.		
■ Adjust the finalists' scores, as necessary.		
■ Select the winning agency.		
■ Notify the winning agency and all of the bidders of the outcome.		
■ Meet with the losing agencies to give them feedback if requested.		
■ Prepare files to document the selection process.		

Chapter 3

Hiring the Ad Agency

Steps To Take

1
Select the contracting mechanism.

2
Negotiate and prepare the contract.

3
Get the contract approved and completed.

Overview

Congratulations! The formal selection process is over, and all your work has paid off in selecting the winning advertising agency to be your partner. The only thing left to do (before starting work on your campaign) is to develop a formal, legal contract with the ad agency.

This contract will be the single document that defines the agency activities, program "deliverables," and the financial and working relationship between agency and client. Creating a good, fair, and well-defined contract now is the best way to avoid potential problems and misunderstandings later on.

In this chapter, you will learn how advertising agencies make money. Understanding this aspect of an agency's business will help you in negotiating and preparing the agency contract.

In Step 1, you will learn about two contracting options: an Indefinite Quantity Contract and a Fixed Price Contract. A set of 1-page primers on each of these contracts will help you select the contracting mechanism that is most appropriate for your agency partnership.

In Step 2, you will negotiate the contract with your agency partner. Negotiating the contract includes determining the final scope of work for the agency, defining the working relationship, agreeing on costs and cost parameters, and putting all of these details in writing in a legally binding document.

In Step 3, you will get the contract approved and completed. Once the contract is written, it has to be submitted for approval and finalized with the appropriate signatures. This may involve reviews and signatures from within your own organization, funding agencies, and/or other involved parties. Guidelines for preparing the contract and background information for approval are outlined on page 68.

Once approved, the real program work and the experience of working with the agency can finally begin.

1-Page Primer

How Advertising Agencies Make Money

Many people believe that ad agencies make big profits. The reality is that agencies usually operate on slim profit margins. The reason for people's misconceptions about agency profits is that agency billings include many costs that pass through their hands. When an agency claims total billings of $1 million, that figure includes their "pass-through" costs for media placements and outside vendors.

The advertising agency business is a service business. Agencies do not manufacture goods or products. Rather they offer the talent and expertise of the people on their staff to create advertising messages and materials. Agencies charge for the services of these staff members in three basic ways: media commissions, mark-ups, and fees.

Media Commissions

The cost of buying time or space in advertising media accounts for the bulk of an agency's pass-through costs. When an agency buys media time or space for its clients, it must pay the media outlet for the time or space and then bill the client.

Ad agencies are often paid for their services through media commissions. Every country has a standard media commission fee, usually 15 percent, which the agency receives from the media, for time and space purchased on behalf of a client. For example, if a magazine charges $100 for an ad, the agency pays the magazine $85, charges the client the $100 cost, and makes a $15 commission on the ad placement.

Usually, the commission is already built into the media costs. The agency pays the media outlet the cost of the ad less the 15 percent commission (net) and the client is billed the full amount (gross).

Mark-ups

Production costs are another pass-through expense for ad agencies. Production costs may include the cost of printing, photography, illustration, TV production companies, or recording studios. Unlike the media costs, however, commissions are not already built into production costs. It is up to the agency to mark up these outside costs.

Most mark-ups on production costs range from 17.65 to 20 percent. The 17.65 percent mark-up is the equivalent of a 15 percent commission on the gross amount.

Agency Fees

As with any service organization, an agency's profitability is determined by the amount of staff time compensated on each account. Media commissions and mark-ups may not cover the costs of all the services provided by the agency. Therefore, in addition to or instead of charging media commissions and mark-ups, an agency may charge hourly fees for the time spent by various staff members—especially account managers and creative staff. These fees usually include the cost of a staff member's base salary, benefits, and operating expenses (e.g., taxes, rent, equipment, etc.), and the hourly rates are agreed upon when the agency contract is negotiated.

Agency fees may be charged by project, based on the task at hand. If an agency charges hourly fees by task, a written estimate of each staff member's time is provided to the client for approval before work begins. Agency fees can also be charged through a monthly retainer. The retainer includes an estimated number of hours that each account team member will spend on the account.

Sometimes, especially when the amount of media or production activity is limited, agency fees are negotiated to cover all of the costs of doing business. In that case, an agency agrees not to mark up outside costs or collect media commissions. Instead, the agency fees cover these costs. Sometimes a combination of fees, commissions, and mark-ups makes the most sense.

After you consider factors such as the amount of your media placement budget, how much production activity is anticipated, and the breadth and scope of agency services required, you can sit down with the agency to work out which system of compensation is best and fairest to all parties.

Step 1.

Select the Contracting Mechanism

Many advertising agencies are relatively new to social communication and government work. Most are not set up financially to comply with the requirements of conventional "government" contracting that frequently seeks to define and track actual salaries by individuals, hourly job-tracking and cost accounting, overhead costs, general and administrative costs, and other indirect costs.

For the vast majority of ad agencies, their private-sector clients simply pay the agency's competitive charges for production and/or design costs along with the standard commissions from media and mark-ups on purchases. The agencies usually set these rates based on a combination of minimal profitability requirements and what the market will bear. (See How Ad Agencies Make Money on page 60 for details.)

Knowing this, you will want to prepare a contract that meets both your needs for basic management and the agency's needs for easy compliance.

Two types of contracts are used most often by public or non-profit sector programs when working with ad agencies. These include:

1. Indefinite Quantity Contracts (With Task Orders)

This is the *preferred contract,* especially for programs that involve *multiple activities and numerous deliverables* and that seek to develop a longer range, ongoing relationship with the agency.

2. Fixed Price Contracts

Fixed price contracts are best used for *short-term, production-oriented* contracts or on contracts that focus on a *finite and small number of well-defined and quantified deliverables.*

A third type of contract is the Cost Reimbursable Contract. This type of contract is not recommended for working with advertising agencies because it is more difficult to track and manage and requires considerable financial auditing, creating a burden on both the client and the agency in tracking expenditures and program activities.

To give you a better understanding of the two preferred types of contracts, a 1-Page Primer on each follows on pages 62 and 63. In addition, on page 64 you will find a Contracting Mechanism Checklist to help you determine the most appropriate contracting mechanism for your agency partnership.

1-Page Primer

About Indefinite Quantity Contracts

An Indefinite Quantity Contract (IQC) establishes the ground rules for a long-term, multi-faceted working relationship. The IQC is best used when a client cannot determine all of the products and services it will need from the agency in advance. An IQC is written for a maximum total ceiling price, but also allows the agency to shift costs as client needs change over time.

Under an IQC, the client has the flexibility to issue individual "task orders" for the production and delivery of specific materials and services based on costs that are negotiated and determined when the contract is prepared. The agency must have a signed task order before beginning work on a specific task, and it gets reimbursed upon the successful completion and delivery of the materials outlined in each task order.

Task orders may be written for a predetermined *fixed price* or for a *reimbursable price*. Under a fixed price task order, the agency is compensated based on a predetermined fixed cost for the deliverables, regardless of the actual costs to the agency for completing the work. A reimbursable task order contains a maximum ceiling for what the agency can charge and the agency is reimbursed only upon presentation of receipts and other documentation.

Fixed price task orders generally are used for those tasks where deliverable costs are predictable such as production of TV and radio ads or programs. Reimbursable task orders tend to be used where deliverable costs fluctuate widely and cannot be determined in advance. For example, paper shortages may have a dramatic impact on the cost of printing program brochures. In that case, the agency and client negotiate those costs prior to developing the task order.

Advantages:

- Easy management of multiple agency activities.
- Easy job tracking and cost accounting by specific task/deliverable.
- Allows for shifting costs without having to do contract amendments.
- Flexibility in making mid-course program changes.
- Allows for ongoing cost re-negotiations if real costs associated with media, paper, printing, video/film, and other direct (out-of-pocket) costs fluctuate widely or change dramatically due to inflation or other unpredictable changes.
- Establishes long-range working relationship.
- Limits the need to predefine every deliverable and activity under the long-range program.

Disadvantages:

- Requires considerable up-front negotiations on deliverables, timetables, hourly fees, internal and external costs, and client/agency working relationships.
- Cost of re-negotiating can work against you if your budget is tight and prices are fluctuating.

Chapter 3

1-Page Primer

About Fixed Price Contracts

A Fixed Price Contract establishes the rules for a working relationship and identifies specific, defined, quantified deliverables and an agreed-upon, inclusive, fixed price for their production and delivery.

Because of the relatively inflexible nature of Fixed Price Contracts, they are best used when the client is contracting for a finite, limited number of production-oriented activities (e.g., 500 plastic signs, 50,000 posters, 2 TV ads, 4 radio ads). Further, because of their inflexibility, caution is advised in writing Fixed Price Contracts in countries where there are extreme fluctuations in costs due to inflation or other factors.

Under a Fixed Price Contract, the agency gets reimbursed only upon the successful and acceptable completion and delivery of the specified deliverable. In addition, the amount of payment for all of the deliverables throughout the contract period is fixed in advance. This payment is made regardless of the actual costs to the agency in preparing and producing the work.

Fixed Price Contracts ignore whether the agency makes a profit or loses money on a job. Rather, they concentrate on the successful delivery of a well-defined product at a previously determined price.

Advantages:

- Easy to manage scope of work, by deliverable.
- Easy job tracking and cost accounting for each specific deliverable.
- Greater control over agency activities and payment schedules.
- Good for short-term, finite deliverables.

Disadvantages:

- Requires considerable up-front negotiations on deliverables, timetables, costs and working relationships, but may involve fewer deliverables.
- Limited flexibility for accommodating changes both within individual deliverables and across program activities, especially in long-term contracts. Needed changes may require contract modifications.
- May require amending the contract if real costs associated with media, paper, printing, video/film, and other direct (out-of-pocket) costs fluctuate widely or change dramatically.

Chapter 3

Contracting Mechanism Checklist

Use this checklist to determine the most appropriate type of contract to use in negotiating the final contract with the agency. Check all statements that apply to your needs. Select the contract mechanism that has the most checks.

Use an Indefinite Quantity Contract and Task Orders

- ❑ I want to establish a long-term relationship with the selected agency.
- ❑ I need a contract that has some flexibility.
- ❑ I will be asking the agency to conduct many different activities and to produce a variety of related materials, but I am still uncertain about the exact quantities and numbers of products to be delivered.
- ❑ I want a contract that is easy to manage.

Use a Fixed Price Contract

- ❑ I only need limited production or media work from the agency.
- ❑ I have a limited number of very specific tasks I need the agency to do.
- ❑ I need a short-term, simple contract, and I need it fast.
- ❑ I want a contract that is easy to manage.

Step 2.

Negotiate and Prepare the Contract

Now that you have determined which contract suits your program best, write a draft of the contract and give it to the agency to review. A sample contract outline appears on page 67. Templates for an IQC and a Fixed Price Contract can be found in Appendices 3 and 4. If you decide to use one of the templates, adapt it to your own needs.

EXAMPLE After a lengthy review process, JHU/PCS hired Campaigns, Inc., to implement a national program in the Philippines. The initial contract mechanism was a Fixed Price Contract with reimbursables. Tasks constantly changed during the course of the program. JHU/PCS was required to justify any changes in the specified tasks and make contract modifications that required a great deal of additional paperwork. Therefore, when it was time to renew the contract 2 years later, JHU/PCS switched to an Indefinite Quantity Contract. The IQC enabled JHU/PCS to develop specific task orders so that the agency, the agency's suppliers, and all the financial staff at JHU/PCS understood the tasks, the work schedule, and the budgets.

Guidelines for Negotiating the Contract

Be fair. Do not create a contract that asks the impossible from the agency in terms of deliverables, deadlines and/or costs. Allow the agency: 1) the resources it needs to meet the deliverable requirements and quality expectations, 2) the time it needs to do the job right, and 3) the opportunity to make at least a small profit on its work. If your account is not profitable, the agency's managers will avoid putting their best people on your work or making your account a priority. Therefore, squeezing an agency too hard is not in your best interest.

Be tough. Being fair also allows you to be tough. Once you give the agency the resources it needs, be sure you "hold its feet to the fire." Do not be afraid to demand that their work be done the right way, on time, and within budget. You want the best the agency has to offer.

Make negotiations a collaborative planning effort. Chances are the winning agency offered a few ideas in its proposal that the Review Committee did not want or like. Or their creative ideas were the best of the competition but off strategy for the program. Maybe the agency left out an important component or suggested an alternative strategy that requires additional thought and discussion. Now is the time to bring the expertise of your team and the agency together in planning out and negotiating what really should take place and who should do it.

Use the agency proposal as a starting point for preparing the contract. Use the agency's winning proposal in determining and negotiating the final Scope of Work and the terms of the contract. The agency gave you unit costs in its competitive proposal. Assuming the specifications of the job do not change, make the agency stick to its original cost estimates. They proposed a timetable for planning, production, and implementation. Use it in developing deadlines for contract deliverables.

Note: The contract is the document that defines the agency/client working relationship. If you include the agency's winning proposal as an attachment to the contract, include an "order of preference" clause. This clause should state that if there are any problems or conflicts between the contract Scope of Work and the proposal, the contract takes precedence over the proposal.

Allow for flexibility. The ability to see into and predict the future is at best fuzzy. No matter how tight the contract, there is always something that comes along during program implementation that requires a mid-course adjustment. Make sure your contract allows you to make minor adjustments as you implement your program.

Specify the approval process. Be sure to identify whose signatures are required on what documents (cost estimates, media plans, strategy statements, copy and layouts, etc.) prior to any expenditures of money or time. Make sure the agency adheres to this procedure in routine practice to avoid serious and costly problems.

Chapter 3

SAMPLE

Ad Agency Contract Outline
Indefinite Quantity Contract

I. Introduction

Identifies type of contract, purpose of contract, and parties involved.

II. Background on Project

Provides context within which contracted activities will take place.

III. Articles

Article 1. Scope of Work

Defines specific roles of agency, assignments, deliverables, reporting requirements, and other activities to be undertaken by the agency.

Article 2. Conditions

Defines working relationship, use of task orders, how activities will be undertaken and completed, ownership and usage rights of materials, and management requirements.

Article 3. Estimated Costs, Pricing Methods, and Billing Procedures

Provides cost parameters, fixed prices for deliverables, allowable commissions, hourly rates, mark-ups, payment points, and billing procedures and requirements.

Article 4. Approval Requirements

Notes any funding constraints, approvals, commitments and signatures required of the two parties. Identifies any specific names who have the ultimate approval authority on both sides of the client-agency relationship.

IV. Attachments

Includes background documents, timetables, fixed price budgets, lists of specifications for deliverables, sample task orders, standard contract provisions, and other relevant attachments.

Chapter 3

Step 3.

Get the Contract Approved and Completed

Before the ad agency can sign the final contract, you will need to have the contract document officially approved and authorized. This may involve a review within your own organization, the funding agency (agencies), and/or other third party groups. Several suggestions for obtaining contract approval are outlined below.

Guidelines for Getting the Contract Approved

Provide necessary background materials. The easiest way to get through the process is to provide all of the materials necessary for approvals. Find out what documentation is necessary so that the approval process goes smoothly. Depending upon your approval system, you might include the following:

- A memorandum that explains the selection process, the evaluation criteria, and the review committee's final scores and justification for selecting the winning agency.
- The original Agency Brief and notes from the Bidders Conference if you held one.
- The selected agency's winning proposal.
- The draft contract.

Be patient. Approvals of contracts take time and often must be reviewed and approved by several different parties involved in developing and managing the project.

Be persistent. Being patient does not necessarily mean being passive. Keep in regular contact with the approval people and process. Ask what you can do to keep things moving along. Ask for anticipated review and approval dates and track progress accordingly.

Help unplug the bottlenecks. The lead time between agency presentation, proposal submission, and contract signing should be tight. Delays lead to flagging interest, poor morale, and escalating costs. If the contract gets hung up in the review process, find out where it is and what, if anything, you might be able to do to facilitate progress. Be available to help clarify issues, resolve problems, and allay any fears.

Keep the agency informed. If the contract is delayed for an extended period of time, be sure to notify the agency. Keep them informed of the progress. Do not let the agency get discouraged or assume that bureaucracy in slow motion means a lack of interest or follow-through in getting the project started.

Demonstrate commitment. See it through from start to finish.

Chapter 3

Schedule for Hiring the Ad Agency

Take action. Set your schedule for hiring the ad agency using this action plan.

Action	Date	
	Start by:	Complete by:
1. Select the contracting mechanism.		
■ Review and understand contracting options.		
■ Complete the checklist to determine most appropriate contract type.		
2. Negotiate and prepare the contract.		
■ Meet with the agency to determine final program activities, Scope of Work, deliverables, working relationships, reporting requirements, and costs.		
■ Use contract outline and examples to draft a detailed agency contract.		
■ Review draft with agency and refine.		
■ Prepare final draft document.		
3. Get the contract approved and completed.		
■ Prepare the contract and background documents for submission to approval process.		
■ Submit documents for approval.		
■ Provide needed follow-up to ensure timely approvals and signatures.		

Chapter 3

Chapter 4

Managing Your Partnership with the Agency

Tips for Success

1
How To Be a Good Client.

2
How To Get the Best from Your Agency.

3
How To Manage the Account Managers.

4
How To Review and Refine Creative Ideas and Products.

5
How To Review and Maximize Media Buys.

6
How To Integrate Research into the Advertising Campaign.

7
How To Leverage the Agency's Resources.

8
How To Monitor the Agency's Activities.

9
How To Avoid Potential Problems.

Overview

You have just completed a major task. You went through a well thought-out process and selected an ad agency for your program. During the process, you probably have earned the respect of the agency and developed a relationship with some of the members of the account team. Establishing a good working relationship with the agency from the outset will help ensure good work and successful results.

In this chapter, you will find a series of tip sheets designed to help you manage your partnership with the agency more effectively. The tip sheets provide ideas and suggestions to help you learn how to be a good client and to get the best work from your agency partner.

Read this chapter before you begin working with the agency and refer to it for guidance as you deal with key elements of the communication campaign. The tip sheets will be especially helpful as you need to make decisions about the agency's creative work and media plans.

To foster a good relationship with your agency partner, practice using the communication and management tips contained in these primers. They will help maximize the agency's efforts and the success of your campaign.

1-Page Primer

How Population and Health Accounts Differ From Typical Commercial Accounts

In working with your ad agency partner, it is important to recognize that population and health program accounts bring many unique challenges to the agency. They are different from the agency's typical commercial accounts in many ways.

Commercial clients assign either product, marketing, or advertising managers to work with the agency on their communication campaigns. These managers have been trained in market and communication research and advertising. They understand the agency's creative process, and they know the principles of media buying. In general, they tend to be more experienced in working with ad agencies, and they have more realistic expectations of what an agency can do.

Commercial clients typically hire an advertising agency to promote a product or service. Population and health communication programs do not usually have such clearly defined products or services as their offerings. Instead, the communication campaign must be designed to promote an idea or a behavior that may not always be so easy for the audience to adopt. In addition, population programs often deal with sensitive messages that must be handled very carefully to be understood and not to offend key audiences.

Commercial clients link their advertising campaigns directly to sales. Their advertising efforts are part of a marketing mix of activities that must deliver revenue to offset promotional costs. Therefore, results are measured in the short term. Population and health communications campaigns usually promote behavior changes that take a very long time to show any evidence of success.

Ad agencies routinely purchase air time and print space for their client's advertising messages. Population and health programs often do not. Lacking the budgetary resources to buy time or space, they rely on free time donated by government broadcasting authorities to get their messages out. Because ad agencies' compensation from their commercial clients depends in large part on the commissions they receive for buying advertising time or space, this difference must be taken into account when establishing the agency's method of compensation. (See How Advertising Agencies Make Money, page 60.)

Commercial clients tend to move very quickly with their agencies on communication campaigns. Agencies can produce complete campaigns for retail clients such as fast food restaurants in a matter of weeks or even days. Unlike health and population accounts, approvals are handled and processed quickly by fewer people. Population and health programs tend to have more complicated approval processes involving advisory committees, senior government officials, partner organizations, and donor agencies. This slows down the message development and production process, often causes delays, and escalates costs.

Despite these differences, ad agencies throughout the developing world welcome the challenge of working on social issue communication programs. Developing effective population and health communications messages gives agency personnel the opportunity to use their talents to help solve challenging and important societal problems. They get to work with people who have often done a great deal of research and who know the problems inside and out. This work offers more meaningful rewards as well as exposure to influential people in the highest levels of government and the voluntary sectors. Finally, working on population and health communication programs gives the agency entrée to new business with companies such as pharmaceutical manufacturers. These intangible benefits are truly attractive to ad agencies who want their businesses to grow and do good work.

1

How To Be a Good Client

Be a partner.

Developing a communication campaign is a collaborative effort. The more you share with your agency, the more successful the end result will be. Treat their people with respect, courtesy, and candor and insist that they will do the same with you. That is the foundation for a great relationship.

Be a member of the account team.

The agency is the communication specialist, but you are the specialist in population and health. The agency needs your input to create brilliant campaigns. Take part in brainstorming sessions. Observe focus groups. Go to TV shoots and photography sessions. Stay involved to ensure that the materials are focused and consistent with the communication strategy.

Identify a single client contactpoint.

Although several people within your organization and other organizations will be participating in the communication process and reviewing campaign messages, one person should be designated to interface with the agency for all approvals and decisionmaking. This will help maintain good relations with the agency, ensure that approvals are made on a timely basis, and control costs.

Do not micro-manage, but demand good work.

Give the agency a chance to share their ideas with you. You have selected them because of their communication expertise and creative talents. Give them enough flexibility so that they can give you their best work.

Give the agency the most important background information before the work begins.

Summarize and highlight the most important background information for the agency so they can absorb it before moving ahead with creating the campaign.

Be available to approve work at each step of the way.

The creative process includes many elements: communication strategy, concept, copy and layout, finished art, and production. These steps offer many opportunities to refine and revise the work. It can be very costly to make adjustments once the work goes into production. If you take the time to check the work along the way, however, the final production work should be adjustment-free.

Ask questions.

If you do not understand something the agency has communicated to you, question it. If you do not like the strategy the agency has recommended, question it. If you do not understand the media jargon, question it. The more you learn about the world of advertising and communication, the easier it will be to become the agency's partner.

2

How To Get the Best from Your Agency

Follow the **3 C's of Constructive Collaboration** to get the best from your agency: **communication, consideration, and compensation.**

Communication

Always keep open the lines of communication between you and the agency. If there is a misunderstanding, do not ignore it. Settle any differences quickly. Also, update the agency on a regular basis, and do not forget to tell them about any policy changes when they occur. Changes in your program or your organization may affect work that is under way. Request frequent status reports (monthly), weekly conference calls, or quarterly review meetings. Copy all appropriate parties to keep everyone aware of your activities.

Consideration

You are not just dealing with an agency; you are dealing with professional people. People will be more inclined to do good work when they are treated with respect. Remember, you are all on the same TEAM: Together Everyone Achieves More! Do not impose impossible deadlines. It takes time to create good work. At the same time, make sure that the agency keeps to your schedule.

Compensation

Agencies only can stay in business and do their best work for you if they make money. (See How Agencies Make Money, page 60.) Make sure that the compensation arrangement is fair and mutually beneficial. Be sure the agency is paid *promptly*. Other rewards are important, too. Public acknowledgment for a job well done, a celebration dinner, or just a simple thank you—all of these can make a big difference.

3

How To Manage the Account Managers

Hold regular meetings. Meet with your account manager regularly to go over agency activities and work plans. Establish a fixed meeting, or telephone conference schedule (e.g., every Tuesday morning at 10) and stick to it.

Document key decisions. Make sure that the account manager provides conference reports summarizing the key actions and decisions made during agency meetings and telephone conversations with you. Send copies of these reports to all appropriate parties at both organizations.

Stay on top of budgets. Review production cost estimates carefully so that you understand what costs you are authorizing before they are incurred. If the scope of work changes, make sure that the account manager provides you with revised written schedules and cost estimates. Review billing procedures, invoices, and receipts so that you understand exactly what you are paying for.

Make the account manager accountable. Hold quarterly reviews to evaluate the agency and the work they are producing. Consider asking for a monthly or quarterly status report on all agency projects. These reports can be circulated internally to keep key persons informed within your organization or at the funding organization.

Resolve differences quickly. If you are having problems with your account manager, discuss it with his or her supervisor. Either the client services director will find a solution to help you work things out with the existing account manager, or an account management change may be needed and the supervisor will act accordingly.

4

How To Review and Refine Creative Ideas and Products

It is your job to review, comment, and, if necessary, redirect creative concepts relative to your program's communication strategy. Be sure to give the creative team the support it needs. Make yourself available to the creative team as needed to provide additional input, information, and guidance.

Developing the Message

- Take the time to fully explain the communication objectives and strategy behind the creative. Use the Communication Message Strategy outline. Make sure the creative people understand the purpose of the advertising. To check, have them explain the strategy to you before you review any message executions.
- Hold discussions on how you want your population/health program to be perceived by the various audiences and how this might be reflected in the style and tone of your messages.
- Emphasize who the intended audience is and how they currently understand and behave relative to your program objectives. Make sure the creative is appropriate for your intended audience. For example, if your audience's literacy level is low, print ads should not have a lot of copy. The ads should rely on visuals or graphics rather than words.
- Use research to pretest the creative concepts before going into costly production.

Reviewing Creative

- Use these **7 C's of Creative Communication** in reviewing the agency's advertising messages:

  Do they **command attention?** Will they get noticed?

  Do they **clarify the message?** Are they simple and direct?

  Do they **communicate a meaningful benefit?** Do they contain a promise or benefit that is believable to the intended audience?

  Are the messages **consistent?** Do they speak with one voice and all say the same thing?

  Do they **cater to the heart and to the head?** Do they present practical information and offer emotional values?

  Do they **create trust?** Does everything about the message seem true and believable?

  Do the messages **contain a call to action?** Do they tell the audience exactly what you want them to do?

- Use these guidelines when reviewing a print ad or poster:

  Can you read it easily and quickly?

  Does it catch your eye?

  Are the visuals clear?

  Is there anything confusing?
- Use these guidelines for reviewing a TV or radio ad:

  Is it simple enough to make the point? Will it stand out among the clutter of media messages?

  Is it timed to match the spot length that it is supposed to (e.g., 10, 20, 30, 60, or 120 seconds)?

  Does the sound and/or picture meet local broadcast quality standards?

Along with all of these *do's,* be sure to follow these *don'ts:*

- Do not force your own preconceived creative solutions on the creative staff; just give them enough time to develop their own.
- Do not try to design an ad yourself. You are paying for trained art directors to do the design work.
- Do not rewrite copy that has been presented. Instead, explain what is wrong and let the copywriter come up with a new approach.
- Do not show creative concepts to people outside of your program area. Concepts are usually rough layouts with headlines, and people not directly involved with the program may not be able to envision what the ads are intended to do.

Reviewing Creative Budgets

- Make sure the production costs are affordable and not excessive when compared with the cost of the media placement budget. You should not pay more to produce a TV spot than you are paying to air it, unless your air time is free.

Obtaining Clearances

- Before final production of TV, radio, and print messages, be sure to obtain necessary approvals of your scripts and storyboards from the broadcast and print media authorities. This step is essential because the media authorities could decide not to use your ads, resulting in a waste of time, effort, and resources.

5

How To Review and Maximize Media Buys

Ask for Clear, Detailed Plans.

- First and most important: Make sure that the media planner speaks to you in language you can understand. If the person lapses into media jargon, ask him or her to clarify unfamiliar terms.

Review Media Schedules Carefully.

- Review media plans and schedules carefully. Have the agency provide you with a rationale to accompany their recommendations. In addition, make sure that numerical objectives (e.g., the number or percentage of viewers or listeners you want to reach) are clearly stated.
- Make sure that the timing of the media schedule (how many ads, when your ads will be placed, how much will it cost) corresponds to the timing and needs of your program. Are all your services, products, and staff in place to accommodate the anticipated response to the advertising?
- Check the spot (or ad) placements the agency has proposed for broadcast messages. You want your spots to run during the time periods when your intended audience is most likely to watch or listen. If media research data are available, make sure the agency shares these data with you and uses the data in developing their placement plans.

Verify Placements of Your Ads.

- Ask the agency to help you verify that the ads have actually appeared as planned. For example, if your media schedule called for 10 spots to run during the week between 21:00 and 22:00, the agency should verify that all 10 spots ran at those times. If the spots do not run as scheduled, demand a "make good" replacement schedule or adjustment in costs. Similarly, demand copies of "tear sheets" (the actual pages from a publication in which your ads have run) for all print ads showing the date, location, and publication for each insert. If advertising monitoring services are available, they can monitor your ad placements and provide a report. If such a service is not available, you may want to assign someone in your organization or hire someone to monitor and verify your placements.
- In some developing countries media data are available on the size and scope of the TV and radio audience for specific channels/stations and individual programs and/or on the readership of specific newspapers and magazines. If such media research data are available, the agency should be able to provide you with a report on the size of the audience that saw or heard each spot. That

way, you will know if your spots actually reached the number of people they were intended to reach. This is called a "post-buy analysis." One way of measuring the delivery of the audience is through analysis of Gross Rating Points (GRPs) either by households or by individuals within specified target groups. If your schedule of spots did not deliver the audience that it was supposed to, you might be able to negotiate cost adjustments to the schedule or "bonus spots" (free placements) to make up for the discrepancy.

- Changes in TV and radio program schedules often occur while a campaign is on the air, affecting media plans that have already been negotiated. If this occurs, ask the agency to propose follow-up plans to maintain the reach, frequency, and GRPs defined for the campaign.

Ask for Free TV or Radio Time.

- Many programs rely on government television and radio stations to provide donated or "free" media time. The advantage, of course, is that there is no cost for running the spots. The disadvantage is that the spots may air only when other paying advertisers do not buy a time slot—i.e., when the size of the audience is very small. Free TV time is often set aside very late in the evening or very early in the morning, when fewer people are watching. Working together with the agency, try to negotiate for good placements of your TV ads. While the agency uses its influence with its media contacts, you should enlist the help of other influentials you know within the media or the Ministries of Information or Health.
- The agency can assist you in identifying the most appropriate programs for your free spots and making sure the spots run as requested. For example, if your intended audience is young men, have the TV station guarantee that the spots will air during football matches that may be taking place during your campaign period.

Review and Verify Print Media Placements.

- If you are unsure of circulation figures, ask the agency for an affidavit of circulation figures for each publication it recommends. Some countries have independent "audit bureaus of circulation" that provide current data on the readership of major publications. Also, check whether information is available on the reading habits of your intended audience.
- Check the ad placement in newspapers and magazines. Did the ad run in the publication in a position known to attract high levels of readership among your intended audience (e.g., condom ads in the sports section for men or oral contraceptive ads on the homemakers page for women)? Keep a notebook of the placements for future verification, reference, and comparison.
- Check the quality of the reproduction of your print ads. A message will lose impact if the audience has trouble reading the ad. In most cases, you can demand a refund or a "make good" placement if the reproduction quality is unacceptable.

6

How To Integrate Research into the Advertising Campaign

Advertising and communication research play a critical role in developing and implementing a successful campaign. Depending upon your needs, different types of research can be used for:

- Understanding and segmenting intended audiences;
- Pretesting and refining creative materials;
- Pilot testing the feasibility of a new product, service, or creative concepts;
- Measuring awareness and understanding of advertising messages;
- Testing the effectiveness of the communication campaign; and
- Determining the response to and results of the communication campaign.

The best way to ensure the success of the communication campaign is to incorporate pretesting and evaluation research into your campaign plans. The extent to which you will be able to integrate research into your campaign activities will depend on your budget. If your research budget is limited, use it for pretesting creative concepts and messages before they are actually produced. If your budget is more substantial, allocate your resources for both pretesting and evaluation.

Some agencies have their own in-house research departments that provide such services to clients. Others may use outside research groups to design and implement research studies. If your agency partner does not have research capabilities, you may wish to hire a research company to work with you and the agency.

There are several advantages and disadvantages associated with using the agency's own research department and with using an independent research firm.

Agency's Research Department	Independent Research Firm
Advantages ■ Understands communication jargon. ■ Often integrated in the agency's message design process. ■ Knows how to convey research and recommendations to creative staff. ■ Can direct the creatives to provide the materials needed for pretesting. ■ Has a vested interest in keeping on schedule.	**Advantages** ■ Totally unbiased about the research findings. ■ No hidden agendas. ■ May have more credibility than ad agency researchers with government officials and donors.
Disadvantages ■ May be biased in reporting the research findings. ■ May be reluctant to report weaknesses or ineffectiveness of messages. ■ May be less credible than independent research firm with government officials or donors.	**Disadvantages** ■ May not be as savvy about dynamics of communication messages. ■ Recommendations may not be as useful to creatives for improving communication messages. ■ May not be in "sync" with the message development timetable, thus slowing down the overall process.

As a general rule, the agency should be involved in the pretesting research by preparing the materials for pretesting; observing the research (e.g., focus groups) if possible, reviewing the research findings and their implications; and revising the messages and materials based on the research findings. Agencies can play an additional role in supporting the campaign evaluation research.

Pretesting Research

Your agency partner should help you with pretesting research by preparing rough versions of advertising messages for use in focus groups or individual interviews. These pretest materials can be in the form of storyboards, concept statements, scripts, rough layouts, animatic videos, etc. The pretesting should be designed to assess your intended audience's understanding of and reactions to the messages. Most important, pretesting should help you identify any major problems or weaknesses that need to be addressed. Based on pretesting findings, the agency should modify the scripts, visuals, graphics, and any other elements of the creative that need to be fixed before the messages are produced.

Evaluation Research

There are several ways to evaluate your campaign. Quantitative pre- and post-campaign studies that measure the intended audience's knowledge, attitudes, and practices (KAP) before and after exposure to a campaign are ideal, but they can be expensive. Such studies require: selecting a random, representative sample of your intended audience, conducting a survey to determine initial levels of KAP, and then conducting a follow-up survey to determine whether KAP levels have changed after exposure to the campaign.

One way of obtaining pre-campaign KAP data is to use existing survey data as a "baseline" measure. For example, data from the most recent Demographic and Health Surveys (DHS) conducted in developing countries may provide these initial measures. You can use the data from the next DHS study to assess any changes following your campaign. The disadvantage of this approach is that studies like the DHS do not often coincide with your timetable nor do they always ask the questions you need for assessing the impact of your specific communication campaign.

Given limited resources, you might consider conducting your pre- and post-campaign studies in one or two geographic areas rather than conducting a nationwide survey. This will reduce your costs and you will be able to measure the results of your campaign in at least one geographic area.

EXAMPLE In Brazil, JHU/PCS worked with PROPATER on a campaign designed to promote vasectomies. The campaign messages used a call to action that encouraged men to call the sponsoring organization and provided a telephone number. This enabled the organization to track the number of calls they received in response to their messages and, ultimately, the number of men who had vasectomies as a direct result of seeing the advertisement.

7

How To Leverage the Agency's Resources

Do a little digging and you will find that agencies can be a rich resource for your program.

- **Find out about the agency's library.** It might contain useful background information for program planning.
- **Ask about additional information resources.** The agency may have access to secondary research studies for additional information about demographics and lifestyles of various audiences. If the agency is affiliated with a multinational agency, it may have other research tools available.
- **Explore tie-ins with other agency clients.** The agency may have other clients who could tie in with your program. For example, one of their packaged goods clients that is interested in marketing products to younger men might help pay the costs of printing posters or T-shirts in exchange for a credit line in one of your ads. Ask the agency to come up with promotional ideas that foster partnerships between your program and their other clients.
- **Capitalize on the agency's media contacts.** See if the agency can work with the media to provide additional exposure by running on-air promotions or by getting involved with media events. For example, a radio station may feature a special sporting event. You can participate by setting up a booth at the event to disseminate materials. As a bonus, your participation would be mentioned on the air. Get to know the people at the media outlets who sell or donate the advertising time or space. Look for merchandising and promotion opportunities such as contests, remote broadcasts, and program features that your program can tie into.
- **Find out about other important contacts.** Find out if the agency can plan a promotional event to garner additional publicity using their contacts in the business world as well as in the political arena. Ask the agency about their contacts with entertainment and sports celebrities to enlist them as spokespeople in your program.

8

How To Monitor the Agency's Activities

Numerous tools can be used to help you keep track of and better manage the agency's activities.

1. Account management

Conference reports. The agency should send you written summaries after each meeting or telephone conversation describing decisions that were made and actions that are required. This helps to avoid any miscommunication between you and the agency.

Budget recaps. Tell the agency how often and in what format you want to receive summary budget reports of expenditures to date.

Monthly reports. Ask the agency to prepare brief monthly reports of all activities that are under way, their next steps, who is responsible, and projected completion dates.

2. Creative

Communication Message Strategy Outline. Before seeing creative concepts, you should have a written message strategy like the one on page 27 to ensure that the creative people are developing ideas that address the agreed-upon strategy.

Production estimates. Production estimates list the costs, by task, for creative work. They should include all outside costs including printing, graphic design, TV production, talent, videotape or audiotape duplication, etc. Depending on the agency compensation package you have arranged, estimates may also include fees or mark-ups to compensate for the agency staff time required to complete the job. Make it a rule that nothing proceeds to final production without a signed estimate by the designated authority.

Revisions and modifications. If a task changes during the production process and new costs are involved, have the agency provide you with a written revised estimate before the new costs are incurred. There should be no surprises on their invoices. You need to be made aware of any changes in costs before having to pay for them.

Production timeline. The agency should provide you with a schedule and other information detailing the production process for each job. That way you will know when you and others need to be available to approve the work.

3. Media

Media schedule. The "media schedule" gives the agency the authorization to purchase the media. The schedule should list by medium: the size of ads or the length of spots, insertion (or placement) dates, the estimated size (or delivery) of the intended audience, the cost for each medium, and a summary of the total estimated audience that will be delivered and the total cost of the schedule. The agency must receive your signature on the media schedule before any media expenditures are made. You may want to share information about when your ads will run with your counterparts. That way they will be able to anticipate the increased demand generated by a positive response to your ads.

Media flow chart. This chart shows the scheduling pattern for all media spots and placements on a weekly basis for the entire length of the campaign.

Proof of performance. All invoices for print media should be accompanied by tear sheets (also called voucher copies) or complete issues of each newspaper or magazine. All invoices for broadcast spots should show the exact times that each spot has run.

Post-buy analysis. The agency should reconcile any differences between the actual broadcast spot placement and what they had originally ordered. If the invoice does not agree with the media schedule, you may receive a credit or the station may agree to re-run the spots in a similar or better time slot. In addition, if audience research data are available, the agency should analyze the spot placements to see if the audience delivery has met their original projections.

9

How To Avoid Potential Problems

From time to time, problems will arise and it is important to deal with them quickly. In addition, there are many things that can be done to avoid them.

Billing Procedures

- Agree to payment schedules that both you and the agency can live with. If outside vendors require up-front payment, make sure the agency gives you sufficient notice.
- Make sure the invoices are accurate and that they relate to the estimates and media schedules you have approved. If they do not, be sure you question them immediately.
- Require that the agency provide updates of media and production expenditures on a regular (e.g., monthly) basis.
- If your payment process tends to be slow, do your part by working invoices through the system as quickly as possible. If you have proper documentation from the agency for its invoices, you should be able to move payments through the system faster.
- Request proper documentation to support each agency invoice.

Ownership Rights

- Make sure the agency contract contains a clause regarding ownership of materials. Are all creative concepts that the agency has presented to you owned by you, even if they are not produced? Or can the agency re-use the idea for another client? Do you own outright all materials that you have bought, or are there special conditions on some of them? Have you paid for these rights? Most USAID-sponsored contracts require as a deliverable the original Betacam SP master and/or submaster for TV and video, or original artwork for print materials.
- Tell the agency to notify you of "special" usage fees that relate to photography and illustration. In many cases, photographers and illustrators charge additional fees for their work if it appears in other media than it was originally contracted for. For example, the agency may have originally hired a photographer for a magazine ad and then want to use the same photo in a brochure. Is the usage fee covered in the original contract, or are there additional charges?
- Aside from media usage fees, there may be a time limit on usage. If you want to use the same photo a year from now, make sure you still own the rights to the photo.
- The best way to handle usage fees is to ask the agency to negotiate a "buyout" for a photo or piece of art. Once you have paid for the art, you own it without restrictions on media usage or time limits.

Talent Payments

- The same may be true of talent costs for broadcast media. Have the agency keep you informed of how the talent that appears in your TV or radio spots gets paid. There may be a one-time talent fee, or the talent may get paid in weekly cycles. If the talent is paid on a cyclical basis, the agency should inform you in advance when the next payment is due so that you can cancel or renew according to your usage plans.

Quality Control

- Ask the agency what quality control procedures they have in place. Does the art director go to the printing plant for "press checks" when materials are being printed? If not, what recourse do they have if the printing does not meet their standards?
- Have the agency give you a production schedule so that you can anticipate when your approval is due at each stage of the production process. Even after you have approved the final art work (also called camera-ready art), you should still be part of the approval process. That includes reviewing color transparencies and blue lines that the printer produces.
- When attending the filming of TV spots, the agency's role is to make sure the spot closely matches the approved storyboard and that the spot is flowing as planned. Your role is to make sure that there are no mistakes in communicating the program message.

Case Study: The Indonesia Blue Circle Campaign

How the Indonesian Family Planning Program, BKKBN, hired a private sector advertising agency

This case study demonstrates how the Indonesian Family Planning Program, BKKBN, conducted its search for an advertising agency to launch its major Blue Circle campaign. Although the agency selection process required significant staff time and effort, the benefits proved to be well worth the costs.

Initial meetings were held with several of the larger advertising agencies in Jakarta to learn more about the business norms and range of advertising capabilities available from the private sector agencies.

During these initial meetings, many of the agencies expressed reservations over the public sector's ability to conduct a truly competitive agency search, one free from internal influence and/or price fixing.

Based on these meetings, a protocol was developed for selecting the agency. This included the development of a competitive bidding process designed to maximize BKKBN's understanding of each agency's strategic and creative capabilities prior to making their final selection. At the same time, the process was designed to give the participating agencies a sense of confidence in the integrity of the competition and selection process.

Several novel approaches and rules were developed to encourage agency participation. For example, agencies were asked to prepare both strategic plans and speculative creative approaches in their proposals. As compensation for this extra effort, participating agencies that delivered completed responses that met the minimum stated criteria were paid $1,000 US for their work. Typically, most agencies spent considerably more than this in developing speculative logos, print ads, posters, radio messages, original music, and more.

In addition, unlike most public sector requests for proposals, the agencies were told exactly how much money would be available in the advertising/communication budget for the 2-year program. As such, rather than evaluating agencies on a lowest cost basis where direct comparisons of activities and costs would be difficult, agencies were evaluated on a highest value basis. In other words, agencies needed to demonstrate how they would allocate the same budget to provide the maximum return and results to the project.

Finally, the agencies were told exactly how their responses would be evaluated, using a numeric scoring system weighted to specific criteria that were outlined and explained in the request for proposals.

EXAMPLE BKKBN followed these steps in selecting an advertising agency:

1. A comprehensive Agency Brief was prepared by BKKBN with the support of Survey Research Indonesia, a private sector marketing research company. This document included:

- A detailed outline of the program's objectives, intended audiences, and overriding strategies.
- Background information, including quantitative findings from prevalence and other family planning studies and reports from qualitative studies such as focus group discussions and communication pretesting among members of the target audience.
- A description of the advertising agency selection process, including a detailed outline of how agency proposals would be scored using specific and weighted evaluation criteria.
- A statement of what agencies must do in preparing their proposals. In this particular case, agencies were required to submit:
  - background information on their agency, including key personnel and related experience;
  - a detailed description of how they would accomplish the objectives outlined in the Agency Brief;
  - a sample media advertising plan;
  - initial creative ideas including at least one prototype logo, newspaper ad, poster, and radio ad; and
  - a description of who would work on the project and how it would be managed.

This Brief was sent to a short list of eight ad agencies that BKKBN believed had the capabilities to successfully complete the project.

2. To eliminate any potential for bias, a Bidders Conference was held at BKKBN, where all invited agencies could ask questions and seek clarifications on the project and bidding process. Attending agencies received the benefit of answers to everyone's questions. In addition, those agencies unable to attend the conference received written notes of the questions and answers. After this conference, no further communication was allowed between BKKBN and the competing agencies.
3. Agencies were given 4 weeks to prepare their responses to the Agency Brief. During this time, BKKBN selected six key staff people to act as the formal Proposal Review Committee.
4. Once proposals were submitted, members of the Review Committee read and scored each of the proposals individually before coming together as a group to discuss their collective findings. Six agencies submitted proposals to BKKBN.
5. The top four scoring agencies were then asked to make a presentation to the BKKBN Proposal Review Committee to clarify any points and to justify their recommendations. In addition, agencies were requested to have the presentations made by the individual staff members who would be assigned to the family planning account. This allowed BKKBN to gain exposure to several of the "intangibles" (such as personal "chemistry," ability to answer questions, etc.) associated with developing a close working relationship with an advertising agency.
6. After the presentations, Review Committee members were allowed to revise their original scores based on their perceptions and improved understanding of the agency's recommendations. Finally, after all the presentations had been completed, the committee met as a group to calculate their collective scores.

   Two agencies scored very closely together at the top. After considerable discussion, PT Fortune Indonesia (Fortune) was selected as the winning agency, based on its strong, strategic-based creative. A 2-year, fixed price contract was signed.
7. Finally, losing agencies were thanked in writing and notified about their loss, complete with explanations which included their overall scores and comments on the strengths and weaknesses that surfaced in the review of their proposals. Qualified agencies were compensated as promised.

Example of Selecting an Advertising Agency (continued)

8. It is worth noting that the plans outlined in the winning proposal were not expected to be the exact blue print for program implementation. Rather, the purpose of the bidding process was to determine the best agency for the job, based on how they approached problem solving related to the urban population program.

Once selected, the task of developing the final program plans and activities became a joint effort of BKKBN, Indonesian Doctors Association (IDI), Indonesian Midwives Association (IBI), Fortune, the United States Agency for International Development (USAID) and the technical assistance staff at the Johns Hopkins University/Population Communication Services (JHU/PCS).

9. The final step involved establishing a workable management system at BKKBN. The day-to-day management of the advertising agency and urban campaign activities were housed at BKKBN's Bureau of Integration. In addition, a formal program committee, consisting of senior executive staff from IDI, IBI, BKKBN, and USAID met on a regular basis to review and approve all campaign strategies, plans, and activities. This committee also provided important direction and support to all policy and potentially sensitive political issues related to the development and implementation of the campaign.

Appendices

Appendix 1

Glossary

Account. The client or customer; also refers to the business relationship between an advertising agency and its clients.

Account manager (account executive). The person at the advertising agency who acts as the liaison between the agency's specialists and the client.

Advertising agency (ad agency). Private (or sometimes public) sector companies that specialize in developing, creating, and placing advertising messages in newspapers and magazines and on TV and radio.

Advertising medium (media). Any vehicle used to convey an advertising message to its intended audience such as newspapers, magazines, billboards, TV, or radio stations.

Agency brief. The document that describes the client's communication needs and the agency's Scope of Work. During competitive bidding, the Agency Brief also defines the rules of the agency selection process and specifies the requirements for submitting responsive proposals.

Animatic. A rough version of a television message. Line drawings are created to represent each key visual in the message. The video portion is produced by shooting each line drawing, frame by frame, on videotape or film. Motion is simulated by the camera's moving in or out or left to right. The audio portion of the message is recorded and then edited to be the exact length of the message.

Art director. The person responsible for visualizing an ad or creative concept and for overseeing its design and sometimes production. Often works closely with the copywriter (see page 99) to come up with the idea for creative messages and materials.

Artwork. The picture or other visual elements in an ad or other printed materials.

Bidders conference. A meeting with the agencies who are bidding on the account to answer any questions and to explain the nature of the communication program and the client's communication needs.

Billings. Total gross revenues of an agency from all clients, usually expressed in annual terms. Billings typically refer to the amount of media expenditures placed or spent by media type (e.g., TV, radio, or print billings).

Blue lines. The printer's "proof" made from printing negatives that is processed on special paper in shades of blue. Used to check whether all type, images, pages, and positioning are correct prior to actually printing the job.

Buyout. Refers to a type of contract that transfers all rights to the use of talent, artwork, music, etc. to the client. Only important in countries where ownership rights must be negotiated.

Campaign. Repetition of a series of TV, radio, and/or print ads that are created around a single theme or idea; although individual executions may differ from medium to medium, they all reflect a consistent strategy and share common elements.

Campaign strategy. Defines the advertising campaign's objectives, intended audiences, key messages, and the media channels that will be used.

Client. The customer of the advertising agency.

Collateral. Materials such as brochures, posters, flyers, and other promotional materials that support a communication program. Sometimes referred to as "below the line" materials in many countries.

Color transparencies. A positive colored photograph on transparent film; used as copy for color separation and viewed by transmitted light.

Communication. (From the Latin word "communicatus" - to make common) The act of creating, through written or spoken messages, common knowledge and attitudes about a subject (e.g., family planning) between a message sender and receiver.

Communication strategy. A written statement that includes the program's communication objectives, intended audiences, an understanding of the communication problem to be addressed, and the program's message strategy (see page 26). This document provides the direction and consistency for all program messages and materials.

Community-based. Communication activities that occur at the community level; includes interpersonal communication/counseling, outreach, community meetings, and community mobilization.

Concepts. Rough ideas that represent different ways of presenting communication messages. Concepts are developed during the initial stages of message creation.

Conference reports. A summary description of the key decisions, actions, and responsibilities agreed upon during meetings and telephone conversations with the ad agency and its clients.

Copy. The written words in an advertisement or other printed materials including headlines, subheads, captions and text (also called body copy).

Copywriter. The person responsible for developing the idea for an ad and writing the detailed copy or script. Often works closely with the art director to come up with the idea for an ad and to visualize the campaign.

Cost per thousand (CPM). The cost of delivering one thousand impressions within a defined population group. For example, the CPM equals the media cost (in dollars) divided by gross impressions (in thousands). CPMs are used to compare the efficiencies of media vehicles or schedules.

Cost reimbursement contract. Under this type of contract, the costs allocated for agency activities and deliverables are predetermined using mutually agreed upon cost estimates that are based on the agency's projected labor and materials costs. Agencies are reimbursed for their actual labor and expenses associated with their expended level of effort.

Creative. The work created by the ad agency's copywriters, art directors, and TV or radio producers; often referred to as "the creative product;" also applies to agency personnel responsible for these activities.

Deliverables. The agency's finished products as specified in the agency's contract.

Finished art. The artwork such as illustrations, photographs, or logo symbols created by the agency and ready for production.

Fixed price contract. A contract that identifies specific, defined, quantified deliverables and an agreed-upon, inclusive, fixed price for their production and delivery.

Focus group (interviews or discussions). A type of qualitative research method in which an experienced moderator leads a group of 8 to 12 people, typical of the intended audience, through a discussion of selected topics. The moderator allows the group to talk freely and spontaneously but also probes group members about their attitudes and beliefs. Used to pretest message concepts and to obtain reactions to initial creative ideas.

Formative research. Research studies conducted during the initial stages of program and message development. Includes reviews of existing research studies, pretesting concepts and messages, or trying out a program on a small scale before full implementation.

Frequency. The average number of times the target audience is exposed to a message.

Graphic designer. A person who designs print ads and other printed materials such as brochures, posters, flip charts, etc. Usually works under the direction of an art director.

Gross. The rate or cost for media time or space, which includes the agency commissions.

Gross Rating Points (GRPs). The total number of rating points accumulated in an advertising schedule (usually broadcast). GRPs are used by a media buyer or advertiser as a criterion to determine the "saturation" level of a particular campaign. The number of GRPs is proportionate to how heavy a campaign an advertiser wishes to deliver. Percentage reach times frequency equals total GRPs.

Indefinite quantity contract (IQC). A contract that identifies agency activities and deliverables to be completed during the life of the contract including predetermined, mutually agreed upon cost estimates, based on the agency's projected labor and material costs.

Layout. The design for a complete advertisement or other printed materials.

Mark-ups. The fee the ad agency charges its clients for supervision of production services such as printing, photography, illustrations, and any other outside activities. Usually negotiated as a fixed percentage of these costs in the agency's contract.

Media buyer. A person who specializes in negotiating and buying time or space in advertising media.

Media commissions. A form of compensation for the agency, usually a fixed 15 percent fee, which the ad agency receives from the media in the form of a commission for media time and space purchased on behalf of a client.

Media flow chart. A media schedule that shows media placements by element on a weekly basis for the entire length of an advertising campaign.

Media plan. The document that specifies the particular type of advertising media to be used, the rationale for using each medium, the costs, and other considerations for buying and scheduling ad time or space (or negotiating for donated time).

Media planner. A person who determines the specific advertising media that should be used in an advertising campaign, based on audience characteristics and research measurements, if available.

Media schedule. The plan that specifies the exact time, dates, and locations where ads will be placed in each medium.

Media strategy. Defines the broad types of media that will be used in an advertising campaign or a communication program and provides the rationale for these decisions.

Merchandising. Promotional materials distributed to retail (including health service delivery) outlets and/or sometimes directly to customers that support an advertising campaign or a communication program. Also referred to as collateral.

Message strategy outline. A brief outline which states the communication objectives, primary and secondary audiences, key messages/promise/positioning, main support points or benefits, desired action response, and the tone of the message to be developed. This outline can be used for developing individual campaign materials and advertising messages or for an entire campaign.

Monitoring report. A report of the actual times each TV spot was placed on each channel or station.

Net. The bottom line cost of placing an ad: gross cost minus the ad agency's commission.

Positioning. A term used to describe how a product or service is presented in the marketplace. Positioning requires a carefully crafted integration of product development, service delivery, pricing strategies, distribution strategies, and communication messages designed to capture a predetermined niche in the market.

Post-buy analysis. A report on the size, scope, and composition of the audience that saw or heard the ad(s) that ran in the media schedule.

Press checks. A final check of printed materials such as brochures or posters that is conducted at the printing plant as soon as the printing presses begin printing your particular printing job. A press check provides the final stage quality control measure that allows you to make any necessary printing adjustments on the press, as your job is being run.

Pretesting. A type of formative research that involves gathering the reactions of the intended audience to concepts, messages, and materials before they are produced in final form.

Prime time. Time periods when the largest number of radio and television sets are in use and the size of the audience is usually the largest.

Production. The mechanical process of turning approved scripts or copy and layouts into the finished campaign materials that appear in the media.

Promise. The word used to describe what the communication message is giving to the recipient, usually expressed as a benefit or reward they can expect in exchange for doing what is asked in the message.

Proposal Review Committee. The group of people charged with reviewing the agencies' proposals and selecting the winning agency.

Protest. A formal objection to the procedures or outcome of the ad agency selection process brought by a losing agency or possibly the funding organization.

Rating. The percentage of a specific population group that is exposed to a single issue or broadcast.

Reach. The number or percent of *different* people within a target audience exposed to an advertiser's message.

Revenues. The total amount of income received by the agency within a given period (see also billings).

Script. The written text (voice-over or dialogue) and the description of action for a television or radio ad or video program.

Segmentation. Subdividing an overall population into similar subgroups in order to better describe and understand each subgroup, predict behavior, and formulate the appropriate messages and programs to meet specific needs.

Short list. Identification of specific ad agencies determined as the most qualified to meet a potential client's needs. These agencies are invited to bid on the account during the selection process.

Spot. Advertisements that are placed in the broadcast media (e.g., radio spots, TV spots).

Storyboards. Small sketches or drawings of key scenes, used to illustrate the action of a TV script or video program; includes instructions for video images, and audio effects for the sound track. Used to explain the creative concept, gain client approval, and serve as the basis for final production.

Usage fees. The fees charged by artists or photographers that give clients the right to use their work in advertising or other program materials.

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Appendix 2

Example Agency Brief

Request for Proposal (RFP)
for
Advertising and Public Relations Services
for the
National FP-MCH IEC Strategy Implementation Project
Dhaka, Bangladesh

Table of Contents

I. Introduction

The Johns Hopkins University's Center for Communication Programs (JHU/CCP) Bangladesh under financial support from the U.S. Agency for International Development (USAID) has been designated to provide technical assistance in Information, Education, and Communication (IEC) to the Government of Bangladesh (GOB) and other non-government organizations in support of the National Family Planning-Maternal and Child Health (FP-MCH) IEC Strategy Project.

This Request for Proposal (RFP) from JHU/CCP is seeking the services of an advertising agency to assist with the project's initial mass media campaign activities. Offerors should prepare and submit their proposals to JHU/CCP. JHU/CCP will convene a panel to evaluate and score the proposals on the basis of criteria that are stated in Section IX of this RFP. Final selection of the winning agency may include agency presentations and discussions with offerors and solicitation of best and final offers (BAFOs) from those who are in the competitive range.

II. The National FP-MCH IEC Strategy for Bangladesh

The National FP-MCH IEC Strategy for Bangladesh was developed and approved by the GOB in October 1993 to guide the development and implementation of future FP-MCH IEC programs through the year 2000. The National Strategy document represents two years of careful review, planning and consensus, based on a thorough literature review and analysis of IEC-related institutions. It has received wide acceptance across both the Governmental and non-Governmental sectors in Bangladesh.

In August 1994, the Implementation Plan for carrying out the national strategy was accepted by the Ministry of Health and Family Welfare. The GOB named JHU/CCP as the lead agency in implementing the IEC activities outlined in the Strategy. Aspects of the Implementation Plan are already underway and will continue.

As described in the Implementation Plan, the IEC program will be:

- A multi-level, multi-year, phased campaign program that will take place in addition to the current on-going IEC activities of individual organizations in Bangladesh. The program will provide an anchor for any and all FP-MCH organizations wishing to participate and refocus their own organizational activities under the national umbrella. (Participation will not be required.)
- Based on an IEC platform of "informed choice," where appropriate contraceptive choices are available and clients take part in choosing a method based on accurate information and an improved understanding of specific modern methods.
- Focused on promoting FP services (as opposed to awareness of concepts) and emphasizing the role of FP-MCH providers in a way that builds credibility, acceptability, personal relevance, and greater accessibility through role-modeling positive service behaviors.
- Targeted to specific audiences and audience segments based on segmentation needs and appropriate contraceptive choice, with a focus on specific geographic

markets (e.g., urban areas, Chittagong/hard-to-reach rural areas) and demographic targets (e.g., young married couples, men).

- Based on a foundation of research, and developed, implemented and evaluated using a widely accepted and disciplined marketing communication process.
- An integrated program involving mass media, community media, interpersonal communications/counseling, social mobilization, training, research and evaluation, and organizational cooperation/collaboration.
- Provided and promoted to organizations as a backdrop for a wide range of quality improvement initiatives in clinical services, counseling, client service, management, MIS, etc.
- Designed for maximum participation by any and all GOB and NGO organizations seeking to improve their FP-MCH IEC capabilities and programs.

As indicated above, mass media is one of many interventions that will be used throughout this multi-year program to sustain and promote contraceptive use among young married couples and among current users of contraceptives. Mass media advertising as well as radio and television programming and journalistic coverage will be designed and orchestrated to reinforce and enhance interpersonal communication/counseling and key program interventions.

This RFP is for advertising agency services needed to support Phase I of the Implementation Plan. During Phase I, the program will create an identity for the FP-MCH National Strategy initiative by producing and promoting the program logo. This phase will be followed by future efforts to promote FP-MCH service providers and correct and continued use of available contraceptives.

III. Terms of the Subcontract

JHU/CCP intends to issue an Indefinite Quantity Contract to the successful offeror. Because this subcontract is funded through a prime contract funded by the government of the United States, the subcontractor must adhere to U.S. government regulations.

IV. Scope of Work

Overview of the Logo Campaign

As noted above, Phase One of IEC Implementation will be devoted to creating an identity for the new FP-MCH National Strategy initiative. Phase One is not limited to a media campaign. Rather, mass media will be used to:

- Support and enhance the distribution of logo materials to selected sites nationwide;
- Build credibility and visibility for the National agenda among influentials and community leaders; and
- Generate awareness and understanding of the availability of FP-MCH services under the National Strategy.

The media advertising component will be an integral part of the larger campaign effort, which includes other media exposure such as journalistic/news coverage, and special programming on the TV and radio Population Cells. There will be community-based activities including the National and local launch events. Logo distribution *and* merchandising will take place at FP-MCH sites nationwide. Interpersonal communication will be carried out through both static sites and outreach program efforts.

The mass media campaign will include a comprehensive television, radio, print and outdoor advertising campaign. The logo campaign which will be developed and produced under this subcontract will be the first of several media campaigns that will support the National Strategy IEC program.

The logo campaign will be developed and executed to support the dissemination, identification and recognition of the FP-MCH logo as a designation for FP service/commodity sites. Advertising messages will be targeted to specific audience segments, based on findings from the program's qualitative research. This research will be provided to the subcontractor after contract award.

This campaign will feature the FP logo in a wide range of potential settings (hospitals, Thana health clinics, Family Welfare Centers, Satellite Clinics, Pharmacies, FWAs, CBDs, in Urban, peri-urban and rural areas). The message will be:

> Wherever you see the logo, you'll find FP-MCH services and commodities; and no matter where you are, you're not far away from the logo.

This media-based campaign will be launched *after* the FP-MCH logo has been placed in appropriate locations throughout the country. It is anticipated that this will include about 8,000 static clinic settings, 20,000 Satellite clinics, 100,000 SMC outlets, and ultimately 40,000 FWAs/CBDs.

FP logos, in a variety of sizes and materials (e.g., plastic and tin signs) will be produced based on a final assessment of the numbers, specific locations and range of needs by location. In addition to the identification logos, a logo-specific waiting room poster will also be developed and distributed.

For the logo campaign, 3 different 60-second television and 4 different 60-second national radio ads will be created. Two different regional radio ads will be created for each of the 5 regional broadcast stations. Finally, 3 large and 3 small format print ads targeted to community leaders will be developed. All together, the logo advertising campaign will run for approximately 20 weeks.

In addition to preparing the market for the new FP-MCH program, the logo campaign will be designed to provide important feedback and lessons learned, which will be factored into the larger "providers" campaign that will follow the logo campaign. For example, distribution activities will require identification of provider sites, allowing for an initial data base and a testing of the distribution systems to be established for future program use.

Pre- and post-logo campaign awareness and knowledge studies among consumers will identify relative strengths of TV versus radio impacts and national versus regional placements. This research will enable the project to fine tune media plans prior to launching.

Communication Message Strategy Outline

Project Name: Bangladesh FP-MCH National Strategy Implementation Plan: Logo Introduction Campaign

Statement of the Communication Problem To Be Addressed:

Create an identity for the new FP-MCH National Strategy Initiative by producing and promoting a new program logo.

Communication Objectives:

- To identify and promote specific locations of all FP-MCH service providers where services and/or commodities are available.
- To create awareness and build interest and acceptability for the new FP-MCH service delivery system.

Primary Audience (List Demographic and Psychographic Characteristics):

- Married Couples of Reproductive Age, including:
- Young married couples
- Men

Demographic Characteristics:

Urban areas as well as key regional areas such as Chittagong

Speaking Bangla or local dialects

Poorly educated; low levels of income

Key Message/Promise/Benefit:

Whenever you see the logo, you will be assured of information and services for tending to yours and your child's health needs.

1. You can take care of both you and your children under one roof (umbrella).
2. Your children's health will be taken care of.
3. Provider locations that carry this logo sign are convenient.
4. They have all the information you need about spacing and limiting the size of your family.

Desired Action Response:

Understand and use the integrated services that a logo-marked center provides.

Program Parameters and Assumptions

For planning purposes and to provide a consistent set of parameters under which your response to this request for proposals can best be prepared and evaluated, you should use the following assumptions in proposing activities under this scope of work:

- The media campaign will be staged over a 20-week period and the campaign will be divided into three distinct waves.
- Free media time and space will be secured for placing the TV, radio and print advertisements developed under this subcontract.
- For bidding purposes, assume that the total available budget to produce, implement, manage and complete the communication activities outlined in the scope of work is $500,000 US. The actual budget will be negotiated at subcontract award. We are interested in seeing how the agencies can maximize this hypothetical budget across the campaign activities.

Subcontractor Roles and Responsibilities

The agency will be responsible for working directly with JHU/CCP, and in concert with other subcontractors as needed, in providing the appropriate personnel and company resources needed to deliver the following types of services:

- Creative services including (but not limited to) creative concept development, copywriting, art direction, design, production, printing, duplication, and placement of television, radio, print and billboard advertising, posters and signs.
- Planning and implementing a major special event for national launch of the logo campaign.
- Account management services including all aspects of program, financial, personnel, and supplier (production companies, printers, etc.) management, monitoring and reporting. In addition, account management services will include translations (Bangla-to-English-to-Bangla) of campaign materials and messages, to facilitate JHU/CCP review and approvals.
- Collaborate with research and evaluation specialists, designated by JHU/CCP, in developing prototype materials for pretesting, providing inputs into formative research and monitoring and evaluation studies.

After the subcontract award, specific guidelines will be established for developing and implementing the campaign. It is anticipated these guidelines will include weekly meetings at the JHU/CCP office.

Specific Tasks

Prior to development of the materials under each of the task areas, the agency will be required to prepare and submit a management plan and a schedule for producing and implementing the mass media campaign.

All messages and materials will be developed and produced in Bangla. This will require translations to and from English for JHU/CCP review and approval. All communications with JHU/CCP must be in English.

Specific tasks supporting the various elements of the mass media campaign are outlined below.

In preparing your proposal, responding agencies are asked to describe how they will develop, produce, and orchestrate the campaign messages and activities. In addition, agencies must provide samples of the following items as specified in Section VIII. Requirements for Responding, Items #4 and #5.

- Layouts for the FP-MCH prototype logo, logo concept/slogan, and service delivery site signs;
- Scripts for TV and radio ads;
- Designs for the materials (newspaper ad, billboards, posters);
- Creative ideas and plans for the national launch of the logo campaign.

Agencies must address the activities listed under the various task areas to be considered responsive. However, agencies need not be limited by the activities within the tasks when preparing their proposals. As such, agencies who wish to challenge specific activities, suggest alternative and/or additional activities, and/or recommend and justify other campaign considerations are encouraged to do so, provided these alternative ideas and suggestions remain within the budget of $500,000 US and time-frames outlined under the program assumptions above.

JHU/CCP reserves the right to change the specific tasks to be conducted throughout the course of the campaign, based on changes in the campaign design.

Task 1. Develop and Produce FP-MCH Prototype Logo and Logo Concept/Slogan

A key component of the National FP-MCH IEC Strategy is to develop a logo that will symbolize the delivery of quality family planning and maternal and child health services to the men and women of Bangladesh.

The following strategic parameters are suggested to guide the creative process:

- The FP-MCH logo will not be designed to be a replacement for any of the existing FP-MCH program logos. Rather, it should be designed to represent the larger, over-riding national FP-MCH agenda, under which each of the individual GOB and NGO programs and services can be orchestrated or coordinated. Prototype national logos must visually enhance and work in association with any and all of the existing FP-MCH program services and their logos.

  Likewise, prototype symbols/images should not be too closely associated or linked with any of the individual logos currently in use by the various FP and MCH programs and organizations.
- The logo concept/symbol should be:

  inclusive to allow for the full range of FP and MCH services to be represented. Symbols should represent the "big picture" or overarching continuum of all FP and MCH health services for families;

  simply/easily described by word-of-mouth, radio advertising and aural recognition;

  easily reproducible in a wide range of sizes across a variety of materials;

  inexpensive to render and produce; and

  visual, with minimal copy to communicate effectively with illiterate audiences.

In addition to developing the logo art, the subcontractor will develop a slogan or theme line to describe the orchestrated continuum of services across the FP and MCH spectrum that the National Strategy will offer families.

Task 2. Produce 100,000 Plastic/Tin Signs and 300,000 Stickers for Service Delivery Sites

Using the final FP-MCH logo art, 100,000 plastic/tin signs will be produced and erected at the service delivery sites. The signs will be produced in two sizes: 3 x 3 feet and 2 x 2 feet. In addition, 300,000 stickers will be produced, measuring 6 inches x 6 inches. The stickers will be water/weather proof and easy to post.

Individual service delivery sites will be visibly marked with the national FP-MCH program logo. This includes permanent or static clinic sites, temporary and satellite sites, outreach workers, and door-to-door delivery sites.

Logo materials will be distributed and placed by all of the participating NGO and GOB participants, and should be posted at any and all locations that provide information, services, or commodities associated with FP and MCH services. This distribution will be nationwide.

Task 3. Produce Three (3) 60-Second TV Spots

Three different TV spots will be developed and produced for the mass media campaign. One TV spot will be produced for each wave of the campaign as follows:

Wave 1—Logo Introduction ad

Wave 2—Young Women's and Young Families' ad

Wave 3—Men's ad

Task 4. Produce Four (4) National 60-Second Radio Spots

Four different national radio spots will be developed and produced for the mass media campaign as follows:

Wave 1—Logo Introduction ad

Wave 2—Young Women's ad and Young Families' ad

Wave 3—Men's ad

Task 5. Produce 15 Regional 60-Second Radio Spots

Three different regional radio ads will be produced for the campaign for each of the five regional broadcast stations for a total of fifteen spots. The regional radio messages will be produced to meet specific regional needs, identify locations and support local program activities. To further localize and personalize regional radio, messages will be produced in local dialects.

The regional radio ads will be produced for the campaign as follows:

Wave 1—Logo introduction ad for each region

Wave 2—Women's ad for each region

Wave 3—Men's ad for each region

Task 6. Produce Six (6) Newspaper Ads

Selected national and local newspapers will be used to reach key leaders and decision makers with highly targeted messages designed to expand support of the FP-MCH National IEC Strategy.

This limited and highly targeted campaign will be focused in specific geographic areas and among selected target leadership groups where acceptance of FP is low, or where FP-MCH program priorities are highest.

The newspaper ads will be produced as follows:

Wave 1—Introduction to Leaders Ad: 1/2 page Junior

Public Launch Ad: full page

Logo Recognition Ad: 1/4 page

Wave 2—Young Women's Ad: 1/4 page

Wave 3—Men's Ad #1: 1/2 page Junior

Men's Ad #2: 1/4 page

Task 7. Produce 500,000 Posters

The agency will produce and paste 500,000 posters for the logo campaign in two sizes, approximately 30 x 20 inches and 20 x 14 inches. The posters will be put up at all FP-MCH sites and at various public places such as markets, community facilities and in conjunction with program activities, launches, films and other community events.

Task 8. Paint and Erect 1,000 Billboards

Outdoor billboards will be used to reinforce and further the local market visibility of the logo campaign. The subcontractor will paint and erect 1,000 billboards each of approximately 20 x 10 feet on a single design. The billboards will be posted for a period of one year, starting during the first week of the logo campaign.

At least one billboard will be erected in each Thana. However, the remaining 500+ billboard placements will be weighted for the two priority markets of Chittagong and urban areas. Boards will be posted in prime locations along well-traveled routes.

Task 9. Plan and Implement a Major National Launch Event

A major event will be planned for the National launch of the FP-MCH logo campaign. This event will take place at the beginning of the second week of the introductory wave of the campaign and will lead into the first round of heavy public exposure to the mass media campaign messages.

Task 10. Reporting Requirements

Agencies will be responsible for the day-to-day management and tracking of their assigned activities, including the management of personnel, suppliers, in-house resources and financial data.

Subcontractors will be required to submit periodic reports providing updates on activities, accomplishments, and expenses over the reporting period. In addition, if and when necessary, these reports can be used to identify any problems or potential problems in completing workscope activities and the proposed steps to remedy the situation.

Reporting requirements under the subcontract will include but not be limited to:

- Monthly campaign activity and monitoring reports;
- Periodic activity reports;
- Periodic financial invoices;
- A final project report.

V. Deliverables

Based on the scope of work, it is anticipated that the final list of deliverables and appropriate quantities under the communication component might be as follows:

Task 1. Develop and Produce FP-MCH Prototype Logo and Logo Concept/Slogan

- Camera-ready artwork for the FP-MCH logo
- Camera-ready artwork of the FP-MCH slogan

Task 2. Produce 100,000 Plastic/Tin Signs and 300,000 Stickers

- 100,000 plastic and tin signs produced in two sizes: 3 x 3 feet and 2 x 2 feet
- 300,000 stickers produced in one size: 6 inches x 6 inches

Task 3. Produce Three (3) 60-Second TV Spots

- Three different television advertisements

Task 4. Produce 4 National 60-Second Radio Spots

- Four different radio advertisements

Task 5. Produce 15 Regional 60-Second Radio Spots

- 15 different radio advertisements tailored for the five regional radio broadcast station audiences

Task 6. Produce Six (6) Newspaper Ads

- One full-page ad
- Two half-page ads
- Three quarter-page ads

Task 7. Produce 500,000 Posters

- 500,000 posters in two sizes, approximately 30 x 20 inches and 20 x 14 inches

Task 8. Paint and Erect 1,000 Billboards

- 1,000 single design 20 x 10 feet billboards

Task 9. Plan and Implement a Major National Launch Event

- Communication plan for the event
- Promotional materials to support the event (to be proposed by the agency)

Task 10. Reporting Requirements

- Monthly campaign activity and monitoring reports
- Periodic activity reports
- Periodic financial invoices
- Final project report

VI. Unit Cost Estimates

For cost comparisons and eventual contract negotiations, agencies are requested to submit realistic and competitive cost estimates for producing the mass media campaign deliverables based on the specifications outlined below.

Cost estimates must be provided with sufficient information to justify the estimates. Agencies are requested to include and itemize: 1) Internal Production Costs; 2) External Production and Media Placement Costs; and 3) All standard indirect "mark-ups" in their cost estimates.

Agencies must disclose their company policies regarding standard commissionable and non-commissionable items including media, production, expenses, and other cost data.

Agencies will be held to their submitted individual unit cost estimates when negotiating the final contract.

1. 500 Plastic Signs

Include: Design prototype and final artwork, mechanical production to camera-ready (or disk ready if on DTP) and printing.

Size: 3 x 3 feet
Colors: 2-color
Artwork: Logo illustration
Cost for production up to camera-ready/disk-ready:

Printing: 500 plastic signs
Printing cost for 500 plastic signs:

2. 500 Tin Signs

Include: Design prototype and final artwork, mechanical production to camera-ready (or disk ready if on DTP) and printing.

Size: 2 x 2 feet
Colors: 2-color
Artwork: Logo illustration
Cost for production up to camera-ready/disk-ready:

Printing: 500 tin signs
Printing cost for 500 tin signs:

3. One Television Advertisement

Include: Concept development, copywriting, development of prototype animatic/photomatic for pretesting, all production (pre/post) up to final ready-for-airing spot.

Length: 60 seconds
Format: On location; drama style presentation; minimal props; no special effects; some titles and artwork to be added in post-production; shot on Beta SP
Talent: Three principals on camera; one voice-over announcer
Copies: Two tapes for broadcast; two videocassettes for non-broadcast viewing

Total production costs:

4. One Radio Advertisement

Include: Concept development, copywriting, development of rough spot for pretesting, all production up to final ready-for-airing spot.

Length: 60 seconds
Format: Dramatic dialogue with composed, original jingle/music
Talent: Two principal voices; one voice-over announcer
Copies: Three tapes for broadcast; two audio cassettes for non-broadcast listening

Total production costs:

5. One Newspaper Ad

Include: Concept development, copywriting, development of prototype for pretesting, mechanical production to camera-ready (or disk-ready if on DTP) and printing.

Size: 1/2 page
Colors: Black and White
Artwork: Illustration

Cost for production up to camera-ready/disk-ready:

6. 500,000 Campaign Posters

Include: Concept development, copywriting, development of prototype for pretesting, mechanical production to camera-ready (or disk-ready if on DTP) and printing.

Size: 30 x 20
Colors: Four-color process color
Artwork: Illustration
Stock: Coated, good quality poster stock

Cost for production up to camera-ready/disk-ready:
Printing: Full bleed, 500,000 copies

Cost for printing 500,000 copies:

7. 1,000 Billboards

Include: Concept development, copywriting, development of prototype for pretesting, development of final artwork, painting and erecting billboard.

Size: 20 x 10 feet
Color: Full color
Artwork: Illustration
Cost for production up to painting and erection:

Cost for painting and erecting 1,000 billboards:

VII. The Bidding Process

The following steps will be taken in conducting the bidding process, selecting the winning agency, and developing the Fixed Price subcontract.

1. A bidders conference will be held on November 2, 1995 to review the scope of work and to answer questions for prospective bidders.
2. A formal review committee will review proposal responses. The committee will rate the proposals using the evaluation criteria and the point-based scoring system included in Section IX of this RFP.
3. Upon receipt of agency proposals, review committee members will independently review and score all written submissions. Scores will be calculated for both the technical and the unit costs components.
   - The committee will then meet and collective scores based on the individual assessments will be calculated.
   - If a clear winner is evident based on the points spread, bidders will be notified in writing of the outcome.
   - If scores are close enough to warrant further deliberations, each of the top contending agencies will be invited to participate in a formal agency meeting and to submit a best and final offer (BAFO).
4. Agencies will be requested and required to send the specific staff assigned to work on the project to make a brief presentation of their proposals. At this meeting review committee staff will have the opportunity to ask questions and seek clarification and/or further justification of the ideas presented in the agency proposal.
5. After each agency meeting, review committee staff will have the opportunity to adjust their original scores upward or downward, depending upon the presentation. Individual scores will then be re-calculated for determining the winning agency.
6. Should agency scores still remain too close to call, the review committee will debate and reach consensus on selection of the final winner.
7. Bidders will be notified of the outcome. Interested agencies can request information on the reviews of their submitted proposals. At no time, and under no circumstances, will proprietary information regarding a competing agency's proposal be divulged to competitors.
8. After the selection process is completed, the winning agency will meet with JHU/CCP technical and financial staff to plan the final workscope and develop and negotiate the final subcontract.

VIII. Requirements for Responding

Agencies are required to submit the following in response to this RFP.

1. <u>Cover letter</u>: A one-page cover letter signed by a responsible official of the bidding agency. The letter should contain the name, mailing address, telephone number and other relevant contact information of the proposer.

2. Introduction: A brief overview of the assignment as understood by the proposer and a brief statement of the proposer's overall technical approach;
3. Technical proposal: A detailed description of how the agency will approach and complete the workscope outlined in this RFP. Agencies are encouraged to generate ideas, suggest details, and if appropriate, offer alternative and/or additional suggestions. In preparing the agency's approach, agencies should demonstrate their abilities to think and plan strategically in addressing the communication activities outlined in the workshops.

   The technical proposal also should include:

   a) A description of who will be assigned to the account team and how they will manage the project. CVs (biographical data sheets) on the staff assigned to the project must be included.

   b) Initial creative ideas including:
   - Layout(s) for the FP-MCH logo and slogan;
   - A design for the plastic/tin signs;
   - A sample script and scenario for Wave 1 television advertising;
   - A sample script for Wave 1 national radio advertising;
   - A sample 1/4-page newspaper ad for Wave 1 print advertising;
   - A design for the campaign poster; and
   - A mock-up design for the campaign billboard.

   c) A suggested plan for the national launch of the logo campaign.

   d) A proposed timetable outlining the specific steps to be taken in completing the activities in the workscope.
4. Capability statement: A statement on company capabilities including:

   a) A background summary of the agency outlining areas of expertise;

   b) A listing of total annual billings for the past three (3) years and a breakdown of billings by media;

   c) A description of key agency personnel and functions/departments including account management, creative, media, production, research, etc. and how accounts are serviced;

   d) A current list of clients and any direct experience the agency has working on social issues, public education, family planning, pharmaceutical, and other related project areas; and

   e) Policies related to commissionable and non-commissionable purchases.
5. Cost proposal: A description of how the agency will allocate the total budget across the campaign activities and unit costs for the items listed in Section VI of this RFP.
6. Annexes: Any documents, such as curriculum vitae, or other information, which the proposer feels will assist JHU/CCP in evaluating the proposal, may be attached as annexes. Proposals, excluding annexes, should not exceed 15 pages.

IX. Evaluation Criteria

Evaluation criteria for selecting the winning agency will include both technical and cost categories consistent with the scope of work including:

Technical Approach and Qualifications—100 Points

Criteria	**Points**
1. Agency Background/Experience	10
2. Qualifications and Management of Assigned Account Staff	15
3. Agency Approach and Strategic Thinking	25
4. Initial Creative Ideas	20
5. Logo Campaign Launch Event Plan	10
6. Timetable/Implementation Plan	5
7. Budget Allocation/Value Per Illustrative Budget	15
Subtotal Technical Proposal	100

Competitive Cost Qualifications—25 Points

Criteria	**Points**
8. Unit Costs (5 points per unit cost item)	35
Subtotal Cost Proposal	35
Grand Total—Technical & Costs	**135**

Cost proposals will be evaluated separately. Following review of the proposals, JHU/CCP may request an interview with one or more responsive offerors before making a final decision. Materials covered during interviews may be considered as a factor in the selection process. JHU/CCP plans to award the contract to the responsive offeror that offers the best value to JHU/CCP, cost and all other factors considered. JHU/CCP reserves the right to reject any and all proposals received and to award no contract as a result of this RFP.

X. Bidders Conference

All interested agencies are invited to attend a bidders conference, to be held on November 2, 1995, at 2:00 PM at the JHU/CCP office at House #64/A, Road #8/A, Dhanmondi in Dhaka.

This conference will provide the opportunity for direct communications with JHU/CCP staff about the FP-MCH National IEC Strategy Project and this RFP. No other communications will be allowed during the bidding process.

At the bidders conference, JHU/CCP representatives will provide an overview of the IEC program and the role of the mass media campaign. They will review the key points outlined in this RFP and the requirements and procedures for selecting the winning agency. In addition, JHU/CCP representatives will answer any questions agencies may have prior to starting work on their responses/proposals.

Within this open forum, any agency can ask questions and all attending agencies will benefit from the answers. By the end of the bidders conference, each agency will leave with the same level of understanding and base of knowledge with which to prepare their proposals.

XI. Due Dates

Responses to this Request for Proposals are due no later than 4:00 PM on November 29, 1995. Proposals delivered and/or received after this deadline will not be considered and will be marked disqualified and returned.

Please submit 5 copies of your written response by mail or hand-delivered to:

Johns Hopkins University/Center for Communication Programs
House #64/A, Road #8/A
Dhanmondi
Dhaka, Bangladesh

JHU/CCP reserves the right to add or delete information, or otherwise amend the contents of this RFP during the period of preparation of proposals. JHU/CCP reserves the right to extend the period specified for presentation of proposals.

All proposals, once submitted, shall constitute firm offers and may not be retracted for a period of ninety (90) days following their submission. It is understood that proposers assume the cost of preparation and submission of proposals.

Responses to the RFP, and all written and oral communications between the JHU/CCP and prospective bidders, including the negotiated subcontract, will be in English.

Appendix 3

Template for an Indefinite Quantity Contract

INDEFINITE QUANTITY CONTRACT
BETWEEN
THE JOHNS HOPKINS UNIVERSITY
AND
(Name of Contractor)
(Project/Subcontract No. ________________)

This Indefinite Quantity Contract is made and entered into between The Johns Hopkins University (hereinafter referred to as "JHU") having an office at 615 N. Wolfe St., Baltimore, MD 21202, and ____________________ a (for profit/non-profit/governmental agency located in _____________ (hereinafter referred to as the "Contractor").

WHEREAS, JHU desires to (insert brief statement of purpose of contract); and

WHEREAS, the Contractor is willing and able to carry out the tasks required under this contract;

NOW THEREFORE, JHU and the Contractor mutually agree as follows:

Article I. Project Background

(Insert brief statement on project background)

Article II. Scope of Work

JHU and the Contractor mutually agree that the Contractor will conduct the following general Scope of Work in accordance with the Workplan in this document, according to the terms of Article III Estimated Cost, Pricing Method, and Billing Procedures. As required by Article III, each activity must be specifically approved by JHU before the Contractor begins work on that activity.

A. OBJECTIVES

(Insert statement of quantifiable/qualitative objectives)

B. PROJECT ACTIVITIES

(Insert specific activities that will take place to meet objectives)

Article III. Conditions

A. Before the Contractor begins work on any activity under this Contract, that activity must be specifically approved in writing by JHU along with a detailed budget.

B. Activities will be conducted using the Scope of Work and Workplan as guides.

C. The Contractor will notify JHU promptly of any delays or problems in carrying out the Scope of Work.

D. The Contractor will provide all administrative, professional and technical personnel needed for carrying out the Scope of Work.

E. JHU will provide technical assistance as required in undertaking the Scope of Work.

F. JHU will approve (insert specific tasks that JHU will need to approve, e.g. strategic approach, messages, final versions of all materials and the media plan prior to broadcast or distribution of any and all materials produced under this Contract). This approval will also include approval of fixed or estimated costs of production and/or broadcast, as appropriate.

G. Insert any other special conditions that will be followed under this Contract (e.g., how many copies will JHU get, who will keep the masters, any specific rights in data).

Article IV. Estimated Cost, Pricing Method, and Requests for Services, Billing and Payment Procedures

A. Estimated Cost

The maximum authorized cost in local currency is ___________ equivalent to U.S. ______ at U.S. $1 = _______, unless increased through written modification to this Contract. The minimum amount that JHU will spend on this Contract is __________, equivalent to U.S. __________ at U.S. $1 = ______. The budget shown in Attachment B reflects the current plan for this contract and is for illustrative purposes only.

B. Pricing Method

The following pricing method will be followed for any activities conducted under this Contract:

(Insert Contractor's Pricing method agreed upon in negotiations)

C. Requests for Services, Billing and Payment Procedures

JHU and the Contractor will adhere to the following billing in performing and paying for the work required under this Contract:

1. When JHU needs an activity conducted (e.g. strategic approach document, pre-testing, or a material produced), it will write a request to the Contractor asking for a budget for this work.
2. Within five (5) working days of receipt of this request, the Contractor will submit a budget according to the pricing methods defined above.
3. JHU will review the budget and either approve the budget as submitted or negotiate a new budget with the Contractor. Upon approval, JHU will issue advance payments as noted below:

(Insert negotiated arrangement for advances)

4. Upon completion of the work, the Contractor will submit an invoice for the amount against that activity attaching receipts if required (i.e., if the activity is paid on a cost-reimbursable basis). At a minimum, each invoice must contain the following information:
   - Items being invoiced;
   - Date activity was approved by JHU & the Contractor;
   - Dates of service;
   - Notices of exchange for advance payments made;
   - Amount being invoiced, along with appropriate documentation, i.e., receipts for reimbursable expenses incurred or a breakdown of fixed price items; and
   - Other applicable information.

   The Contractor may not submit an invoice for an amount greater than that in the original budget unless that increase has been authorized in writing by JHU. If any funds advanced to the Contractor for any activity remain unspent at the conclusion of that activity, then JHU can either (a) request reimbursement from the Contractor in the amount overpaid for that activity or (b) deduct the amount overpaid for that activity from any payments due to the Contractor for other activities. If any funds advanced to the Contractor during the life of this Contract remain unspent at the conclusion of this Contract, those funds will be refunded to JHU within 30 days after the Contract is over.
5. JHU will review the invoice and if the work was completed satisfactorily, and the invoice is correct (i.e., is in line with the original terms of the budget and work requested), will pay the invoice within 30 days of receipt.

Article V. Period of Performance

The effective starting date of this Contract will be ____________________ or upon signature by both parties. The effective completion date of the Contract will be __________. The period of performance of this Contract will not exceed _________ months, unless increased by a written amendment to this Contract.

Article VI. Standard Provisions

The attached Standard Provisions (Attachment C), are hereby incorporated into this Contract. Add the following provision:

Audit

An audit may be conducted on the Contractor's records as related to this project by an independent public accountant. JHU will notify the Contractor prior to the initiation of the audit. JHU reserves the right to audit if the independent audit does not take place or is unacceptable.

Article VII. Termination and Suspension

This Contract may be terminated by either party at any time upon (a) thirty (30) days written notice to the other party, or (b) in the event that the U.S. Agency for

International Development (USAID) serves JHU a Notice of Termination under Cooperative Agreement No. ____________________. Upon notification, the Contractor will proceed in an orderly fashion to limit or terminate any outstanding commitments and to conclude the work. All otherwise allowable costs or commitments incurred prior to the date of termination will be reimbursed.

Article VIII. Approvals

The following activities require prior, written JHU approval:

A. Purchase of imported goods or services to be performed in other countries;

B. Publications; and

C. Other required approvals as stated in Article I, Scope of Work, Article II Conditions, and Article III, Estimated Cost, Pricing Method and Billing Procedures.

Article IX. USAID Approval

This Contract is entered into with the understanding that it is subject to the approval of USAID, and that this Contract will have no force or effect, unless and until such approval is obtained.

Article X. Contents

This Contract consists of the following:

- Article I-X
- Attachment A, Workplan
- Attachment B, Budget
- Attachment B1, Budget Justification
- Attachment C, Standard Provisions
- Attachment D, Contractor's Fee Charging Guidelines (Price List)

IN WITNESS WHEREOF, the parties hereto have executed this Contract on the day and year specified herein:

FOR:	THE JOHNS HOPKINS UNIVERSITY School of Hygiene & Public Health Center for Communication Programs 615 N. Wolfe Street Baltimore, Maryland 21205; USA	FOR:	Contractor Name/Address
BY:	____________________ (Signature)	BY:	____________________ (Signature)
NAME:	____________________	NAME:	____________________
TITLE:	____________________	TITLE:	____________________
DATE:	____________________	DATE:	____________________

Appendix 4

Template for a Fixed Price Contract

FIXED PRICE CONTRACT
BETWEEN
THE JOHNS HOPKINS UNIVERSITY
AND
(Name of Contractor)
(Project/Subcontract No.)

This Fixed Price Contract is entered into between The Johns Hopkins University, an educational institution having an office at 615 N. Wolfe St., Baltimore, Maryland 21205; USA, (referred to in this document as "JHU") ______________________ and located in ______________________ (referred to in this document as the "Contractor").

This is a Contract under JHU's Population Communication Services (PCS) project funded under Cooperative Agreement No. ______________ from the U.S. Agency for International Development, (USAID), administered through the Center for Communication Programs (CCP). This Contract is entered into with the understanding that it is subject to the approval of USAID, and that this Contract shall have no force or effect unless and until such approval is obtained.

The Contractor hereby agrees to perform the work described in Attachment A, Scope of Work, under the conditions detailed in Attachment A; and to comply with all of the provisions of Attachment C, Standard Provisions. This work shall be performed starting ______________ and ending ______________.

The total fixed price payable for the work performed under this Contract is __________. This amount shall be paid as specified in Attachment B, Budget and Payment Provisions.

This Contract consists of this page and Attachments A, B, and C described above, and can only be modified in writing.

FOR: THE JOHNS HOPKINS UNIVERSITY
School of Hygiene & Public Health
Center for Communication Programs
615 N. Wolfe Street
Baltimore, Maryland 21205; USA

BY: ______________________
(Signature)

NAME: ______________________
TITLE: ______________________

DATE: ______________________

FOR: Contractor
Name/Address

BY: ______________________
(Signature)

NAME: ______________________
TITLE: ______________________

DATE: ______________________

Order Form

How To Select and Work with an Advertising Agency

To order additional copies of this PCS handbook or to request a floppy disk containing the tools and templates, please complete the form below. (PRINT or TYPE clearly.) Mail or fax to:

Johns Hopkins School of Public Health
Center for Communication Programs
Population Communication Services
111 Market Place, Suite 310
Baltimore, MD 21202-4012, USA

Phone: 410-659-6300
Fax: 410-659-6266
Internet e-mail: mmc@jhu.edu

Family name ______________ Given name ______________
Title ______________________________
Organization ______________________________
Address ______________________________
City ______________ Country ______________
Fax ______________ e-mail ______________

❑ Send ___ copies of **How To Select and Work with an Advertising Agency.** (Maximum of five (5) copies per request.)

❑ Send me a 3.5″ floppy disk containing the tools and templates. Please check the format you want below:

- ❑ WordPerfect 5.1 for DOS
- ❑ WordPerfect 6.1 for Windows
- ❑ Word 6.0 for Windows

❑ Please send me information about people I can contact in my country or region who can assist me with selecting an advertising agency.

Johns Hopkins University School of Public Health
Center for Communication Programs
Population Communication Services

111 Market Place, Suite 310, Baltimore, MD 21202-4012, USA
Phone: 410-659-6300 Fax: 410-659-6266 Internet e-mail: mmc@jhu.edu