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INSERT LOGO

INSERT DATE  
Request for Proposal for:  
INSERT SERVICES

INSERT LOGO

## Notice of Request for Proposal

The <INSERT NAME OF BUSINESS/ORGANIZATION> is seeking proposals from qualified <INSERT TYPE OF FIRM/INDIVIDUAL> for <INSERT SERVICES NEEDED> with experience in <LIST SPECIFIC INDUSTRY EXPERTISE>. The selected agency will <INSERT BROAD DESCRIPTION OF PROJECT/SERVICES - i.e. develop and execute effective, integrated marketing programs that will:

1. <LIST GOAL/OBJECTIVES OF PROJECT/CAMPAIGN>
2. <LIST GOAL/OBJECTIVES OF PROJECT/CAMPAIGN>

### Purpose of the RFP:

Explain why you are seeking a public relations and advertising agency and what you hope to achieve through this partnership.

Provide the type of engagement you are seeking for the partnership - project, campaign, agency of record. Also detail if you have a current agency partner, who they are and the services they perform.

### RFP Timeline and Submission Guidelines:

The following is the approximate timeline and process for agency solicitation, proposal submission, evaluation and selection: *Outline the submission guidelines, including the deadline for proposals, the format for proposals, and the contact information for submitting proposals*

- Issue Date: <INSERT DATE>
- Questions Regarding RFP Due: <INSERT DATE AND TIME>
  - *Include the person and/or email address to whom questions should be submitted.*
  - *Include date answers will be provided back to respondent via email.*
- Responses Due: <INSERT DATE AND TIME>
  - *Include the person and/or email address to whom the proposal should be submitted and the method(s) by which is should be submitted (email, printed/bound and number of copies, etc.)*
- Notification of Finalists: <INSERT DATE>
  - *Include date and method by which finalists will be notified to move forward with interviews and presentations.*
- Interviews/Presentations with Finalists <INSERT DATE(S)>
  - *Include the location for interviews, length of interview, presentation/information to be shared, and who will be evaluating finalists.*
- Final Selection <INSERT DATE>
  - *Include date and method by which the selected firm will be notified.*
- Contract Development <INSERT DATE>
- Contract Start <INSERT DATE>

**Background:**About <INSERT BUSINESS/ORGANIZATION NAME>

*Provide two-three paragraphs of background information about your business/organization, its mission and values, and the products/services you provide.*

*Provide any background on your current branding, marketing, or public relations programs as well as an overview or website links to research, strategic plan, economic impact reports, etc. and examples of current branding, marketing and public relations initiatives in the market.*

*Provide an overview of your team or organizational chart as well as information about who the selected agency partner's point of contact and other key decision makers will be.*

Target Markets, Audiences and Key Stakeholders

Detail your business/organization's target markets, audiences and key stakeholders.

**Scope of Work:**

Clearly outline the goals and objectives of the project, campaign or agency, the target audience, and the deliverables you expect from the agency. Include a timeline for when the work will begin and when it should be in the market, as well as your budget.

The general Scope of Work includes:

*Strategy:*

Work closely with our team to collaborate on strategy to develop, execute, and measure results for an annual marketing plan that supports the overall goals and objectives of the business/organization. The agency will guide overall strategic direction, creative strategy, brand development and stewardship, media strategy, and cooperative strategy.

*Creative & Production:*

Develop an overall approach to brand advertising including concepting creative materials and campaign elements, producing creative, and managing the process of working with additional vendors or subcontractors as needed. The agency will provide all final files for approved creative materials for use in execution of PR, marketing and advertising campaigns for the business/organization.

Creative materials may include, but are not limited to:

- Print advertising
- Broadcast advertising (TV/CTV/OTT, radio, video)
- Digital and social media advertising
- Signage
- Collateral
- Sales materials,

The agency will adhere to the existing brand standards and style guide, or the new brand standards and style guide as created under this scope.

#### *Content Planning:*

Work with the business/organization to develop a comprehensive, integrated content marketing plan that leverages market intelligence and existing research to:

- Achieve goals and objectives specific to the scope of work
- Define and create audience personas
- Shape strategies/tactics to achieve success
- Reach defined target markets, audiences and opportunities
- Implement specific actions that guide and track workload
- Measure measurable outcomes.

#### *Website Design and Development*

- Develop content strategy to ensure updated, valuable content across all areas of the site.
- Improve SEO, website performance
- Ensure scalable architecture for ease of growth, maintenance, and change over time.
- Ensure access to users through traditional Web browsers, mobile and tablet

#### *Platform Specifications*

The proposed solution should include a content management system (CMS) that will permit non-technical staff to easily update website content.

- Be scalable to accommodate growth in the number of sections, pages, and authors.
- Provide browser-based content editing capabilities.
- Support cross-platform and cross-browser compatibility and mobile access.

The proposed CMS should support, but not be limited to the following features:

- Search
- Press releases and news updates
- Media: Embed audio/video, multimedia on site pages.
- Form Support: The ability to create Web forms to collect user input, data sent to email account, or database
- Content Editing: Browser based, list of common modules available, permissions, approval process, multiple editors.
- Web Analytics: Statistics for page views, unique visitors, referrers, search queries, export to Excel, visual display, custom reports.

The visual design of the TSCC website should:

- Provide consistent navigation, layout, and styles in a manner that is user-centric and intuitive.
- Be consistent with existing client style guidelines and logo usage.

### *Media Planning & Buying:*

- Develop and prepare media plans for each target market
- Utilize research and market insights to develop strategic recommendations for budget allocation, market prioritization, and channel mix.
- Leverage paid media partnerships and placements as a means to effectively distribute and amplify owned and earned content.
- Provide business/organization with insights on emerging trends and new media to continually evolve marketing efforts to reach the target audience.
- Execute media plans, offline and online, with strategic, cost effective planning and media buying including placement, optimization, cancellations, auditing, payment to vendors, and billing.
- Develop cooperative marketing programs in collaboration with business/organization to amplify the efforts of members/stakeholder businesses and to support overarching objectives.

### *Reporting & Analytics:*

- Provide regular monthly reporting on campaign and brand continuity program performance utilizing expertise, agency tools, data, partnerships, and other resources to manage program efficiency and performance.
- Provide end-of-campaign wrap up reports, including screenshots of all assets, dashboard of goal performance and executive summary of key takeaways that include qualitative and quantitative results mapping to larger objectives.
- Continue to look for ways to evolve measurement and reporting to communicate value to the business/organization's key stakeholders.

### *Research:*

- Participate as needed in customer insight, creative testing and segmentation research.
- Provide data, creative assets and/or insights as requested for business/organization's research and reporting.
- Connect with research partners including <list research partners> as needed.

### *Account Support:*

- Maintain regular communication on all activities such as creative and production development.
- Provide an annual summary of all activities.
- Attend on-site meetings throughout the duration of the agency relationship as needed, at agency expense.
- Provide clear budgets and plans outlining when payment and materials are due for paid insertions prior to placing insertions.
- Provide estimated budget forecasts with breakouts for expected costs upon receiving annual budget at the start of the fiscal year; to be reviewed by agency and client and approved by client prior to work commencing. R

- Collaborate with other partners and agencies supporting the business/organization;s marketing communication efforts.
- Assist with special or out-of-scope projects, to be discussed and agreed upon by agency and client on a case-by-case basis.

### **Selection Criteria:**

Define the criteria that will be used to evaluate proposals. This may include factors such as agency experience, creativity, strategy, budget, and project management capabilities.

Provide an overview of the selection process and explain how the proposals will be evaluated, who will be involved in the selection process, and when agencies can expect to hear back from you. *Following are a list of commonly used criteria used in evaluating proposals:*

- Track record in building successful or out-of-the-box content marketing campaigns with measurable ROI
- Ability to deliver exceptional and innovative integrated work while strictly adhering to ROI/KPI metrics
- Highly creative and enthusiastic people across all parts of the agency and cultural fit with business/organization
- Familiarity with business/organization/products and how knowledge is integrated into the proposal
- Experience in the industry, associations and not-for-profit organizations, and/or group sales/meetings advertising
- Capabilities in goal setting, strategic planning, client/agency communication and measurable outcomes with proven ability to turn research and insights into innovative messaging
- Ability to integrate owned media content and public relations efforts
- Budget management, experience delivering cost-effective solutions and ability to negotiate favorable media rates
- Turnkey administrative and account support, from strategic level planning to concise day-to-day communication to timely billing that aligns with budget plans provided by the business/organization
- Level of experience of agency personnel who will take active, day-to-day responsibility for this account and adapt to customer needs
- Proximity to business/organization and availability to meet with the team in market
- Fee/Cost proposal that is reasonable and appropriate for the SOW, providing maximum services in relation to fees charged

### **Agency Qualifications and Proposal Structure:**

Ask agencies to provide their qualifications, experience, and relevant case studies that demonstrate their ability to handle similar projects. Detail a list of information to be provided such as:

1. Company background and how the agency differentiates itself
2. Company leadership and account team who will provide strategic leadership and support for the business/organization

3. Case studies demonstrating expertise for clients in the services and scope of work outlined in the RFP and how success was measured
4. Agency processes for each service as outlined in the RFP
5. Agency's billing and reconciliation processes
6. List of current and past client expertise that aligns with the business/organization and scope of services being requested; identify any current/perceived conflicts of interest
7. Three client references your agency has worked with on similar programs, understanding you are giving permission for the business/organization to contact.

**Proposed Costs:**

Provide a budget range for the project(s), monthly fees, and request a detailed breakdown of pricing structure, including any additional fees or expenses.

**Terms of Agreement:**

Provide the term of the agreement with the selected agency including the date when it will commence and end, and whether extensions for the term will be provided. If extensions will be provided, detail the increments (in months/years) that the term may be extended and are based such as an annual review of accomplishments. Detail whether the annual review will allow for consideration of adjustments in agency scope and fees. Detail the business/organization's right to cancel services and the period for written notice termination of services (i.e. 60-day written notice.)

**References:**

Request references be provided from past clients or partners who can speak to their work and performance.

**Appendix:**

Provide an appendix with B links that may be helpful in the development of proposals.