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## Communication Services

RM3796

Customer Guidance Notes



Government  
Communication  
Service



Crown  
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Service

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# 1

## Introduction

**This guidance document has been produced by the Crown Commercial Service (CCS) and the Government Communications Service (GCS) to help you understand how to use the Communication Services (RM3796) framework. It covers:**

- The steps you need to take to appoint an agency to deliver the services you require
- How to develop a comprehensive brief
- The information you need to provide when issuing your brief
- How to manage the relationship with your agency

The guidance provides you with the best practice approach to using the framework. If you have a particularly complex requirement you may wish to seek additional advice from your own commercial team or contact your GCS thematic lead.

The Communication Services framework agreement allows for further competition for all requirements and a direct award option for virtual events. See page 8 for more information.

### Who can use the framework?

This framework agreement can be used by UK public sector bodies which includes:

- Central Government Departments, Arm's Length Bodies and Agencies
- Devolved administrations
- NHS bodies
- Local Authorities
- Charities
- Universities, colleges, school, further education providers

### The basic further competition process

Hiring an agency through this framework includes the following key steps:

1. Define your objective and the services you require
2. Develop and issue your written brief, evaluation criteria with associated weightings
3. Receive and evaluate written proposals from agencies
4. Inform agencies who have been unsuccessful in getting through to the pitch stage (if used) and advise unsuccessful agencies of the outcome, providing feedback and evaluation scores
5. Conduct a face-to-face pitch (optional)
6. Evaluate and award the contract to the successful agency
7. Inform unsuccessful agencies providing feedback and evaluation scores.

There are additional optional steps that you can take depending on your requirement which are outlined in detail within this document.

## What the framework covers and selecting your lot(s)

Communication Services contains eleven lots offering a variety of services to meet your communications needs. To decide which lot to use, you should first understand what it is you want the agency to deliver for you and then you can identify the lot which best fits your requirement. You will need to develop a brief that will be sent to the agencies on your chosen lot so you can run your competition. If your requirement covers more than one lot (i.e. more than one type of service), you will need to develop a separate brief for each type of service you need. You need to run a separate competition for each lot you want to use.

Paid for media to support your communications should be sourced separately via the Media Buying framework.

The framework provides access to the following services, please see the [lot overview](#) document available on the framework webpage to help you identify which is the right lot for your requirement.

**Lot 1:** Specialist consultancy services

**Lot 2:** Events

**Lot 3:** Channel strategy and planning

**Lot 4:** Public relations (specialist and regions)

**Lot 5:** Proposition development

**Lot 6:** Creative Development and delivery

**Lot 7:** Digital marketing and social media (specialist and regions)

**Lot 8:** Data strategy and management

**Lot 9:** Production

**Lot 10:** Editorial

**Lot 11:** International

You can include international requirements in a domestically focussed brief. However if you have an international campaign or a specific overseas requirement, you should use the international lot.

## The role of CCS

CCS' role is to provide you with advice and guidance on how to get the best out of this framework agreement. CCS can help with any technical queries you may have such as the best way to hire an agency or how to get the best value from them.

CCS manages the overarching contract and the agencies at framework level. You are responsible for managing your agencies at call-off contract level for each project, but CCS can help with any issues you may have that require escalating.

If CCS currently undertakes procurement activity on your department's behalf please email [cs.procurement@crownccommercial.gov.uk](mailto:cs.procurement@crownccommercial.gov.uk) to seek advice at your earliest opportunity.

If you have any queries please call our Customer Service Desk on **0345 410 2222** or email us at [info@crownccommercial.gov.uk](mailto:info@crownccommercial.gov.uk).

## The role of the GCS

The GCS Central Campaigns teams can offer support from a communications perspective as well as your designated Superuser. If you are a central government customer and want advice on your brief or would like a member of the team to be involved in a pitch, please contact your GCS thematic lead.



# 2

## Before you start

**Before you use this framework there are certain requirements that you need to fulfil. In the case of central government communications these steps are mandatory, if you work in other public sector bodies you should follow your own organisation's guidelines.**

### **Professional assurance and getting approval to spend (mandatory for central government)**

If you work in central government or in an arm's length body, you must have approval from Cabinet Office where the contract value is over £100,000, before using the framework. You can access templates and more information on the [GCS website](#).

### **Consult your Superuser**

All central government departments have an appointed superuser to help manage the relationship with agencies. They will review your brief and oversee the pitching process for higher value requirements to ensure there is no bias. Please see the [framework web page](#) for an up to date list of superusers.

### **Management Charge for CG clients**

Central Government clients using this framework are required to pay a management charge of 1% of the total contract value excluding VAT. The charge is a set contribution from all government communications expenditure through this framework that effectively funds the cross government profession, Government Communication Service. It has been in existence since 2013/14, approved by the Civil Service Board, Ministerial Board and with the agreement of all Directors of Communications. The 1% management charge is collected by the appointed agency on behalf of GCS and is added to the total net value of each invoice. This charge is not payable by wider public sector organisations.

### **Allow sufficient time for proposals and evaluation**

Make sure you factor in the time needed to evaluate and run a pitch, if required. Agencies will need reasonable time to review and prepare a response. This includes allowing sufficient time for agencies to consider responses to clarification questions before the deadline for written responses and to prepare for the pitch. We aim to be great clients and should not make our agencies incur excessive costs or resources to win our business. If your budget is small (e.g under 50k) do not expect to run a similar pitch process as a £1m project. Also bear in mind that you will need to evaluate the responses so make sure you build in time to allow for this. Agree who will evaluate the proposals and pitch before you run a tender so you can build this into the overall timetable. Ideally, allow up to 6 - 8 weeks to complete the process, that is from the date of issuing your brief to contract award. An example timetable has been provided in [Annex 1](#).

## Agree how you want to work with the agency

Your contract will need to cover all services you may wish to call off within the lot. Please consider the range of services required when you establish your evaluation criteria and associated weightings. **Please note call-off contracts are for services within a single lot.**

There are different types of arrangements you can have with agencies:

- **Fixed term agreement** - A contract for services for one or multiple projects within a fixed time period
- **Standby agreement** - A contract for one-off or emergency activity for specified services within a fixed time period. Payment terms for this arrangement is per project with no minimum spend.
- **Retainer Agreement** - A contract for a fixed period of time where you agree to pay an agency a fixed fee on a regular basis for work undertaken.

Each of the contracts types listed above should not exceed a four year period (including any extensions). Please seek advice from your commercial function regarding the most suitable agreement for your requirements.



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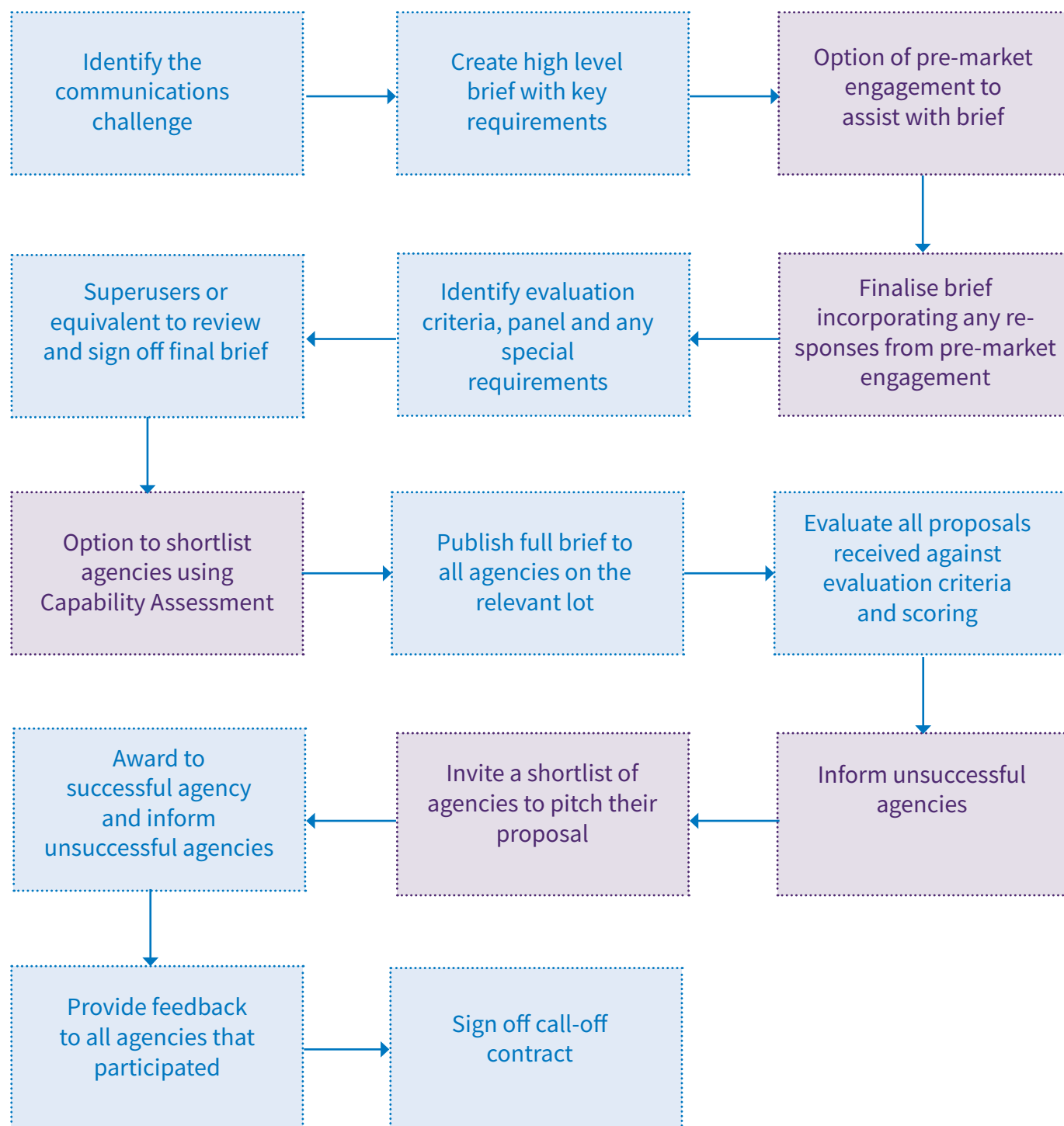
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## Using the framework

The flow diagram sets out the best practice approach to using the framework.



If you are using the direct award provision for a virtual event please follow below guidance.

### Key

Blue - Mandatory  
Purple - Optional

## Virtual Events Direct Award Process

Direct Award for virtual events on lot 2 can be used if the total contract value of your virtual or hybrid event is equal to or below £30K.

Hiring an agency through lot 2 includes the following key steps:

1. Writing your brief
2. Writing your evaluation criteria with associated weightings
3. Issuing your high level brief
4. Evaluate and award the contract to the successful agency

More information can be found on our Direct Award customer guidance which can be found on the CCS website linked [Here](#).

## Identifying the objective

The first step to procuring an agency is identifying the service you require to support your campaign or communications activity.

SMART objectives are the best place to start, however not every issue will be clear cut at this stage. The important points to establish are:

- The ultimate policy objectives
- Broadly who is the target audience
- The role of communications in meeting those objectives
- Any significant barriers to reaching this objective.

### Examples of good SMART objectives

- Ensure that at least 70% of people in the target groups have either taken up their invitation for the seasonal flu vaccination or are very likely to do so by end of November 2016.
- Increase the number of people that claim to test their smoke alarms monthly or more from 31% to 32% in this financial year.
- Increase the proportion of people agreeing that it is realistic to own their own home from 54% in 2015/16 to 60% by March 2017.

## Pre-market engagement (optional)

You may find it useful to communicate with agencies ahead of issuing your brief by undertaking a pre-market engagement exercise. Please ensure this activity is undertaken in a fair and transparent way providing each agency within the lot an equal opportunity. This will allow you to further shape your brief, gather ideas on new innovations and understand if there are any changes within the market that may influence your requirements.

If you decide to speak to the industry ahead of your further competition, you must prepare an outline of your brief before you contact agencies. This can be a draft and does not need to be complete.

You will need to contact all the agencies from your chosen lot, but you can choose how you do this - for instance you can email them for information, invite them to an event or meeting to discuss the brief or issue a formal 'Request for Information'. This stage is for information gathering so if an agency doesn't engage at this point don't assume that they are opting out of the further competition. All agencies should have the option to bid when you issue the final brief.

### Dos and don'ts checklist:

#### Do

- ✓ Contact all agencies on your chosen lot
- ✓ Provide a reasonable time limit to email requests to ensure agencies know by when the need to respond
- ✓ Keep an audit trail of all communications

#### Don't

- ✗ Limit contact only to agencies that you know
- ✗ Contact agencies in different ways, each agency should be given an equal opportunity to respond (i.e. don't email some agencies and phone others to discuss your requirement)
- ✗ Exclude agencies that have not responded to the pre-market engagement to the further competition.



## Writing your brief

The stronger the brief, the better the result. The framework is designed for specific marketing and communications requirements or activity to support a wider campaign. To reflect this, your ask of agencies needs to be proportionate to the requirement. Avoid asking for long, in depth proposals unless absolutely necessary.

Agencies on this agreement are encouraged to work in partnership with your main campaign agency to provide services they may not be able to provide in-house.

**Tip:** To help you write your brief we have produced guidance and a created a template to ensure you include all necessary information, please see [Annex 2](#) for the guidance and the [framework web page](#) for the template. This template is not mandatory.

## Evaluation criteria

You will need to decide in advance what information you need and include this in your brief. Evaluation criteria must be linked to your requirements. This will allow agencies to see how their proposals will be evaluated and the weightings that will be applied against the quality and price scores. We recommend an 80% quality / 20% price split. You can choose the overall weightings and sub-criteria as long as they fall within within the following parameters for each lot:

- Quality - 60 - 95%
- Price - 5 - 40%

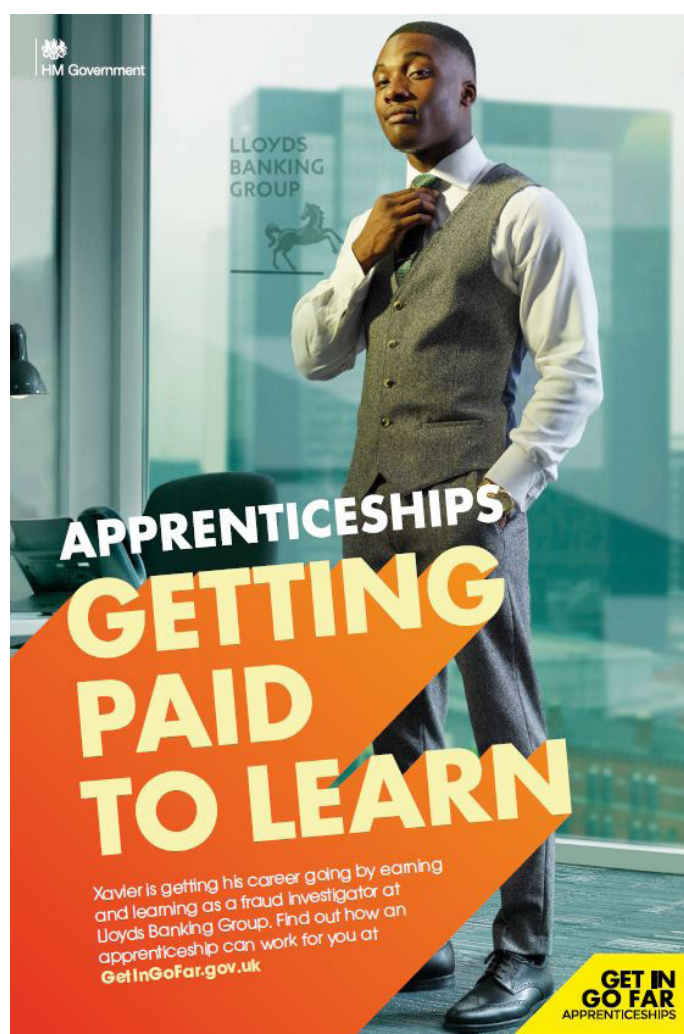
The scores from the pitch stage are added to those for the written responses to provide a final score which identifies the successful agency. Please note you cannot zero the scores from stage one. You must carry them over to stage two and apply the allocated weighting for each stage. Please specify the maximum number of agencies you will invite to pitch. Pitching is costly for agencies and you must ensure that those invited to participate at stage two have sufficient stage one scores to enable them to win the competition.

If you are including a pitch stage, you will need to allocate a % score for each stage which totals 100%. Please don't ask the same question in both stages. The weighting split between stage one written and stage two pitch will vary depending on the brief.

The scores from the pitch stage are added to those for the written responses to provide a final score which identifies the successful agency. Please note you cannot zero the scores from stage one. You must carry them over to stage two and apply the allocated weighting for each stage. Please specify the maximum number of agencies you will invite to pitch. Pitching is costly for agencies and you must ensure that those invited to participate at stage two have sufficient stage one scores to enable them to win the competition.

There is a rate card for the framework agreement which lists the maximum day rates agencies can charge for each role type. These rates cannot be exceeded, please check your bids against the rate card to assess any discounts offered. If you would like help in developing the appropriate evaluation criteria and percentage weightings contact the CCS team:

[info@crowncommercial.gov.uk](mailto:info@crowncommercial.gov.uk).



# 3

## Hiring an agency

**This section covers the process of how you invite agencies to bid for work when you are running a further competition. You will need to engage with your commercial function prior to making any contact with agencies.**

### 1. Shortlisting (optional)

Shortlisting will help you to identify which agencies within your chosen lot are going to be the most suitable.

You may wish to include this if for example, your requirement must be fulfilled in a specific part of the UK, or you are working to a tight deadline and realistically not all agencies will have the capacity to work within your timescales. You should only test capability specific to your own requirement. If you intend to use this stage to identify a shortlist of agencies who can meet your needs, you will need to state this in your tender instructions. You should use a series of yes and no questions and send to all agencies who will have to pass to get to the next stage. We have created a template Capability Assessment which you can use, it is available on the [framework webpage](#).

If you are using the creative lot for a low value requirement, you can ask agencies to provide their standard or a tailored creative creds pack (agency credentials) along with standard written requirements such as service delivery and approach questions and their price submission. You can then invite the highest scoring agencies to develop bespoke creative for a face-to-face pitch. This allows agencies to use less resources when putting together proposals meaning more are likely to bid for your work.

### 2. Issuing your brief

Your completed brief along with all other relevant documents, must be issued to all agencies on your chosen lot, unless they have deselected themselves in a capability assessment. This can be done either via the CCS eSourcing portal or your own procurement tool. A full list of agencies, the lot they are on and their contact details can be found under the 'lot details' tab of the framework webpage, please use these contacts to invite agencies to register on your tendering portal. Please check this list each time to ensure you reach the right agency contact.

If you are using the CCS eSourcing portal, the agency contacts are already set up on a template. This will give you an auditable approach to the tender process. It is used to:

- Respond to clarification questions
- Track bid responses
- Send reminders to bidders
- Communicate to successful and unsuccessful agencies
- Provide feedback to all parties

Please refer to the [eSourcing user guidance](#) for further information.

**Tip:** A checklist of documents you will need to include when issuing your brief has been provided in [Annex 3](#).

## Dos and don'ts checklist

### Do:

- ✓ Invite *all* agencies on the lot
- ✓ State that the competition is being run through the CCS Communications Services (RM3796) framework and identify the relevant lot
- ✓ Provide a clarification period for agencies to ask questions about the brief and respond promptly
- ✓ Include an indicative budget or range
- ✓ Provide a clear deadline for responses
- ✓ State whether there will be a face-to-face pitch and what format this will take
- ✓ Get your brief approved by your department's superuser or equivalent
- ✓ Make sure that your requirements, documentation and evaluation are proportionate to the value and complexity of your project
- ✓ Ensure agencies have equal access to information during the tender process and publish all responses to questions asked or clarifications raised to all agencies involved
- ✓ Communicate any changes to the timescales of your competition to all bidders
- ✓ Provide unsuccessful agencies with feedback

### Don't:

- ✗ Be overly prescriptive, give the agency space to create a solution
- ✗ Use acronyms or civil service terminology
- ✗ Overwhelm the reader with excessive data
- ✗ Use more than one lot per competition
- ✗ Invite suppliers that are not on the relevant lot to the competition
- ✗ Forget to disclose any conflict of interest issues you may have in your brief
- ✗ Ask for too much work upfront. Creative should only be requested as part of the pitch stage (if used) and not part of the written submission
- ✗ Use evaluation criteria which has not been indicated to in the brief
- ✗ Accept prices which exceeds the agreed maximum rates

## 3. Reviewing proposals from agencies

All agencies will need to provide a written proposal in response to your brief. It is recommended that you assign three people to evaluate the proposals as this makes reaching an objective decision easier. Responses should not be discussed outside of the evaluation team and pricing information should be treated as commercially sensitive. Make sure that you maintain a fully documented audit trail of the results and final award decision, which will be useful when providing feedback to the participating agencies.

If you are a central government client and your contract value is over £1m, you must invite a Superuser or equivalent from another department (or ALB) to sit on your evaluation panel.

This evaluator will contribute as an independent to help maintain professional standards and protect your organisation from any accusations of bias (such as towards an incumbent agency).

A list of Superusers is available on the [framework web page](#).

**Tip:** To help make reviewing proposals easier, a template has been developed for scoring written proposals, see [Annex 4](#).

## 4. Moving to a face-to-face pitch stage (optional)

You have the option to invite a shortlist of agencies with the best written response to pitch their proposal as an opportunity for face to face dialogue.

A face-to-face pitch will allow agencies to present more detailed proposals including creative and answer any specific questions you may have regarding their written response. It is also a great opportunity for you to meet the operational team and better understand the skills and expertise they will bring to your requirement.

The evaluation panel should prepare the structure of the meeting. It is recommended that you share an outline of your structure to the shortlisted agencies so that they are able to properly prepare.

If you decide to include a face-to-face pitch, you should make clear in your brief how many agencies you expect to invite, (ideally three) and state the criteria you will be scoring them on. When you notify the shortlisted agencies make sure you give them enough time to prepare for the pitch and allow sufficient time for the pitch presentations. Only invite agencies to pitch who have a realistic chance of winning the brief based on their stage one scores.

Evaluation of pitches should form part of your overall quality score. The weighting for the pitch must be published in your brief from the outset. You should not repeat the questions asked in the initial written stage. An example evaluation matrix, which includes pitch evaluation, has been provided in [Annex 4](#).

### Dos and don'ts checklist:

#### Do:

- ✓ State in your brief whether you intend to hold a face-to-face pitch
- ✓ Request that the agency's pitch team includes the key people that will be working on the contract
- ✓ Ensure the agencies are aware of any technology or other logistical restrictions
- ✓ Inform agencies in advance of who will be evaluating the pitch and their role within your organisation. These should be the same people evaluating stage one written
- ✓ Communicate any additional information that comes out of the face-to-face pitching stage to all shortlisted agencies

#### Don't:

- ✗ Discuss additional information with a particular agency that has not been shared with another
- ✗ Share any information regarding a particular agency's approach
- ✗ Introduce new elements to the brief



## 5. Award the contract

Following the successful completion of your tender you can now award a call-off contract to the successful agency. Once you have the relevant internal approvals in place you can notify all participating agencies of the outcome. A standstill period is not mandatory but can be used for high value briefs.

You must use the standard letter of appointment to form your call-off contract which is available on the [framework webpage](#). The terms are aligned to the call off terms and conditions. There are some sections of this contract that you can alter depending on your organisation and requirements.

The letter of appointment must be completed by your organisation prior to being sent to the agency for signature. The document includes guidance to help you understand how to fill in the relevant sections.

Please send the details of your award to [info@crowcommercial.gov.uk](mailto:info@crowcommercial.gov.uk) including:


- Contract name
- Contract length (including any extension options)
- Contract total value
- Winning agency name

## 6. Providing feedback to agencies

You should provide constructive written feedback to all participating agencies and include a full breakdown of their scoring. Feedback comments should be objective and link back to the evaluation criteria. Make sure that you provide clear feedback to all the agencies that participated so that they understand how to improve for future opportunities.

**Tip:** We have developed a briefing template based on the [OASIS model](#) that you can use as a basis to develop your evaluation, and a scoring system has been applied, which you are able to adapt to your needs, see [Annex 4](#). Please liaise with your commercial function for additional guidance.

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# 4

## Managing your agency and being a good client

**This framework focuses on working in partnership with our agencies. A collaborative approach will allow us to make the best use of their knowledge and expertise to help us design the best communication to reach our audiences.**

### Our obligations as clients

Within the call-off contract there are a number of obligations we have as clients. These include:

- Provide a clear brief setting out your requirements (services and deliverables) and reasonable timelines of each phase of work
- Meet with your agency on a regular basis to discuss progress and performance
- Promptly address any issues with your agency
- Agree at the start of the project how frequently you expect to receive reports from your agency. This should be stated in the brief
- Pay your agency within 30 days of approving the invoice. Check invoices against the rates and deliverables agreed in your contract

### Set clear expectations

Setting expectations in terms of timelines, results or processes is part of your contractual obligation and also means less surprises down the line. This can provide a sense of predictability that helps you to feel in control and confident in the process. You will want regular updates, monthly performance reports and briefings, so make these requirements clear in your brief and ensure they are reflected in your contract for discussion at the start of your project.

You should be able to rely on your agency to give you the expert advice and consultation that comes from its collective wisdom and experience. A great agency will explain every facet of its strategy, offer honest advice and admit when the topic has shifted outside of its expertise. As a client you should also proactively advise the agency on anything it needs to know to deliver the best results.

### Use time effectively

Long-winded emails and unstructured meetings don't give the agency what it needs and is not an effective use of your time. You should expect your agency to use your time efficiently and ensure that meetings always bring value to those involved. A good agency will know and understand this but to make things easier follow these steps:

- Share agendas ahead of time
- Stick to the allotted time scheduled for meetings
- Conclude with next steps for each party
- Provide a note of actions and summary after meetings
- Have the right people in the room (not necessarily the most senior)

## Be responsive

In the world of government and communications, activities move quickly and we don't always have the option of waiting a few days for an agency to respond to an email or return calls. As such, agencies should be aware of the level of service you require in your call-off contract and offer you a dedicated contact that you can rely on for all matters. Equally, your agency is working in your interests so you need to be responsive to its questions and requests to ensure that you are not causing unnecessary delays.

## What to do if things go wrong

By taking the steps above and ensuring that you have regular communication with your agency, you should be able to avoid any major issues.

In the event that you do experience performance issues with your agency you should ensure you put in place a plan of action and take steps to address the issue as quickly as possible.

1. Raise the issue with your agency lead at the appropriate time at your next status meeting or as soon as possible
2. Clearly set out your concerns and agree a plan of action with the agency including a deadline for resolution - put in place more frequent status updates if you feel it's necessary
3. If the issue is not resolved by the agreed deadline, escalate the matter with your Superuser and your board level agency contact
4. Contact the CCS framework manager and the Central Campaigns team to notify them and agree next steps and a course of action
5. If you have carried out all reasonable steps to rectify the issue and allowed time for recourse, then you will need to decide a course of action with your Superuser and then agree with CCS and the Central Campaigns team

Whilst you do have the option to terminate an agency's contract, you should only do this if you have no alternative and all opportunities to resolve the issue have been fully explored. You must make the CCS framework manager and the Central Campaigns team aware if you plan to terminate an agency's contract before you take formal action.



Think! Cycle Safety Campaign, 2016



# 5

## Other frameworks and options

**There are several other frameworks that you may wish to use to deliver your campaign. They are not all exclusively for marketing and communications but may be relevant to your work.**

- [Design 102](#) - if you work in central government you can access the in-house creative design, video and animation services offered by DESIGN102. You can find examples of their work at [www.design102.co.uk](http://www.design102.co.uk) or to get in touch with the team, email [hello@design102.co.uk](mailto:hello@design102.co.uk)
- [Campaign Solutions](#) - a single lot agreement that includes a broad range of agencies with different specialisms. Agencies on this framework will be able to design, plan and execute your entire campaign
- [Media Buying](#) - Manning Gottlieb OMD is the single media buying agency across government and some wider public sector organisations to leverage best value deals or media space regionally, nationally and internationally
- [Media Monitoring and Associated Services](#) - This is a multi-supplier agreement for the monitoring, and analysis of media coverage to enable the evaluation of communications campaigns
- [Public Sector Travel and Venue Solutions](#) - Calder conferences is the single supplier on lot 5 and can be used for venue finding and support services for meetings and conferences (excluding virtual events)



**GREAT, Education is GREAT Campaign, 2016**



## Glossary of terms

Term	Meaning
Brief	This is the equivalent of a Statement of Requirements and forms part of your Invitation to Tender pack
Call-off agreement	A legally binding agreement for the provision of services made between a client and an agency. This is completed following a further competition
Further competition	Is undertaken to establish which of the agencies can offer the best value for your specific needs. Your brief and supporting documents are issued for this process
Direct award	Awarding a contract with a supplier directly without running a further competition (applies to virtual events under £30k through Lot 2 only)
Capability assessment	An optional stage in the further competition process which allows the client to pass or fail agencies to the written proposals stage.
Request for Information	Is the name of the document used when collecting information for your pre-market engagement exercise
Creative Creds Pack	This is a document agencies use to attract new business. It includes example of previous work and clients
Standstill period	A period of at least ten calendar days between the notification of an intention to award and actually awarding a contract. This is an optional part of the process
Superuser	A senior government communicator in each department who is responsible for overseeing relationships with agencies and briefing standards.

# Annex 1

## Timetable for hiring an agency

The timetable below provides an example of the timescales that are involved in a further competition, from the date of issuing your brief to contract award.

You should allow up to 6 - 8 weeks if you choose all recommended options.

			Timescale	
Task	Required/ Optional	Task owner	Working days	Weeks
Brief issued	Required	Client	Day 1	Week 1
Deadline for submission of Capability Assessment	Optional	Agency	Day 4 - 5	Week 1
Evaluation of Capability Assessment	Optional	Client	Day 6 - 7	Week 2
Shortlisted agencies from Capability Assessment notified	Optional	Client	Day 7 - 8	Week 2
Deadline for the submission of clarification questions	Required	Agency	Day 11	Week 3
Deadline for response to clarification questions	Required	Client	Day 12 - 13	Week 3
Deadline for submission of proposals	Required	Agency	Day 16 - 17	Week 4/5
Evaluation of proposals	Required	Client	Day 18 - 21	Week 4/5
Shortlisted agencies notified	Optional	Client	Day 22	Week 5
Face-to-face pitches	Optional	Client and Agency	Day 31 - 32	Week 7
Evaluation of face-to-face pitches	Optional	Client	Day 33 - 34	Week 7
Award contract	Required	Client	Day 35 - 36	Week 8
Project inception meeting	Required	Client and Agency	Day 38	Week 8

# Annex 2

## Brief writing guidance

**You can edit this brief as you see fit as some requirements will not need as much detail.**

**This section will take you through the following areas of developing your agency brief:**

### 1. Summary

### 2. Context

### 3. Objectives

### 4. Audience

### 5. Strategy

### 6. Agency requirement

### 7. Agency response

### 8. Evaluation and appointment

### 1. Summary

Use this section to set out the nature of the brief to the agency. The agency should be able to use the summary to decide whether it would be appropriate for them to bid for your work. Make sure you cover:

- A short summary of the problem your campaign must solve - what is it you are trying to do that needs agency help?
- Any mandatory constraints/services required (for example if you know part of your campaign must include a TV ad)
- Your budget, or if you prefer, a budget range - even if indicative.

### 2. The Problem (and Objectives)

Use this section to spell out in more detail what problem your campaign is intending to solve.

If you already have SMART objectives you should include these here. If you do not have SMART objectives in place you should include the overarching policy outcome required.

#### **Make sure you cover:**

- Details of any outcome goals
- Consider business objectives, brand objectives, channel objectives
- Wherever possible, frame your objectives in behaviour change terms.

### 3. Context (Insight)

Use this section to provide detailed information on the background to the problem.

#### Make sure you:

- Explain who you are as a client - don't assume the agency knows your organisation
- Set out any policy information the agency needs to understand
- Provide policy data, research and any useful links
- Describe any previous communications activity conducted in this field.

### 4. Audiences (Insight)

Use this section to provide information on your target audience, both in terms of audience identification and audience behaviour. Provide a picture of who they are, considering relevant beliefs, motivations, needs, behaviours and barriers.

#### Make sure you include:

- Any raw audience data you have
- Current audience insight, including segmentations, focus group work etc
- Any relevant insights into the customer journey
- Your known stakeholders and influencers
- What you want your audience(s) to think, feel and do.

### 5. Strategy

Use this section to explain your proposed approach (if you have one) and any considerations or constraints the agency should bear in mind when developing or implementing a strategy.

Wherever possible the brief should be encouraging agencies to problem solve rather than being prescriptive in its strategy. You should be clear in this case that you wish the agency to develop the strategy and what it needs to consider in doing so.

If you do have an existing strategy you should be very clear where/if you are seeking new ideas, or challenge.

#### Make sure you include:

- Any sensitives surrounding the brief (for example if a policy has vocal opposition that may impact on any campaign implementation)
- Any existing branding arrangements for this work (reference the cross government identity system if required)
- Any major constraints – for example if the strategy must include a certain channel (e.g. TV)
- Any conflicts or interest/reputational constraints – for example if you cannot work with agencies that have certain clients (for example if your brief is about smoking cessation you may decide it would be a serious reputational issue if your agency had a major tobacco client).



## 6. Agency requirement (Implementation)

Use this section to explain what will be required of the agency should they be appointed. Make sure you include:

- Anything you require it to produce - i.e. problem specific (e.g. a campaign to increase uptake of a service) time specific (e.g. all creative work on issue x over a three year period). Try not to be product specific (e.g. one 30 second television ad)
- The specific role of the agency - be clear on what is to be handled by the agency and/or other agencies and what is being done in-house
- How you will want to work with them - set out your expectations of their account team, including staffing levels, expertise, regular meetings etc. as this will help the agency select the right team and accurately cost their proposal
- Key delivery milestones for the work
- How you will measure their success, in particular what KPIs you intend to set (if known)
- Expectations on monthly management information, data, progress reports, regular meetings etc

## 7. General

- Provide timescales - for award process and campaign delivery
- Specify the contract duration including any extension options
- Specify your requirements for sub-contracting
- Specify any location specific requirement
- Specify any security requirement
- Omitting or adding terms and conditions. The standard framework terms and conditions are designed to meet your needs and have been agreed by all agencies. However, if the terms do not adequately meet your requirements, you may omit or include additional special terms subject to the following:
  - Omitting terms or adding special terms may be proposed only by the client
  - Omitting terms or adding special terms may only be sought at the start of a the process
  - Omitting terms or adding special terms must not be used to substantially alter the framework terms and conditions

## 8. Evaluation process

You need to include the process you intend to follow to evaluate the bids in the briefing documentation. The evaluation procedure must be defined and should include:

- The criteria against which you will assess the responses for both quality and price and the scores that you will apply to rate performance against each criteria.
- The overall basis for determining which agency response is the most economically advantageous offering. Normally this is the bid with the highest overall mark.

The list below gives you a guide to what you should be looking for when evaluating proposals from agencies. It is not intended to be a checklist, nor is it exhaustive, but it gives an indication of how they should be assessed in line with the [OASIS model](#) below.

<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Does the agency show that it understands your objectives and the outcomes that you want to achieve within the desired time timeframe?</li> <li>• Is there evidence of the ability to develop clear objectives around complex projects?</li> </ul>
<b>Audience insight</b>	<ul style="list-style-type: none"> <li>• Does the agency effectively use audience insight and segmentation to inform and develop the campaign/communications?</li> <li>• Does the agency use information about the beliefs and behaviour of different audiences to inform how it will get the best outcome?</li> </ul>
<b>Strategy</b>	<ul style="list-style-type: none"> <li>• Has the agency demonstrated a high understanding of the problem and policy context and convincingly set out how it will address it?</li> <li>• Has the agency put forward a persuasive plan of action to achieve a defined goal?</li> <li>• Does the strategy relate back to the objectives and audience insight?</li> <li>• Are there any innovative approaches to solving complex problems?</li> <li>• Has the agency been sensitive to any political issues and reputational considerations?</li> </ul>
<b>Implementation</b>	<ul style="list-style-type: none"> <li>• Does the creative proposition match what we know about the audience?</li> <li>• Is the execution of any creative of a high professional standard?</li> <li>• Does the agency demonstrate an understanding of the whole communications mix?</li> <li>• Does the agency demonstrate creativity across a number of different media?</li> <li>• Is there anything new or innovative demonstrated?</li> <li>• Does the agency show it can work successfully in partnership with other agencies, stakeholders or partners?</li> </ul>
<b>Scoring</b>	<ul style="list-style-type: none"> <li>• Does the agency show use of KPIs to track progress?</li> <li>• Is there a robust approach to evaluation and improvement in line with GCS standards?</li> <li>• Does the agency add any new or innovative evaluation tools or techniques?</li> </ul>

# Annex 3

## Document checklist before issuing your brief

The table below shows the documents you need to issue with your brief.

Document	Checked?
State the framework reference and lot number at the start of your brief	<input type="checkbox"/>
Dates for the clarification period	<input type="checkbox"/>
Tender timetable which sets out the high level stages of the process and when you intend to award and start the contract	<input type="checkbox"/>
Detail on the process and evaluation of the Capability Assessment stage (if used)	<input type="checkbox"/>
Detail on the process, evaluation and weighting of stage one written proposals	<input type="checkbox"/>
Detail on the process, evaluation and weighting of the pitch stage (if used)	<input type="checkbox"/>
Appendices (if used)	<input type="checkbox"/>
Letter of appointment and call off terms & conditions	<input type="checkbox"/>
Tendering instructions (detail on the submission process specific to your organisation)	<input type="checkbox"/>
Procurement tool registration details (if you are using your own procurement tool instead of the CCS eSourcing portal)	<input type="checkbox"/>

# Annex 4

## Evaluation matrix and score definitions

The table below provides an example scoring matrix with potential weightings that can be used during the evaluation process. You can adapt this to reflect your individual requirement.

	Quality stage 1, Written - 60%	Weighting	Score 0-100	Evaluator comments
<b>O</b>	Objectives	10%		
<b>A</b>	Audience Insight	25%		
<b>S</b>	Strategy	20%		
<b>I</b>	Implementation	25%		
<b>S</b>	Scoring	20%		
<b>Quality stage 2 F2F pitch - 20%</b>				
	<b>F2F pitch presentation</b>	<b>100%</b>		
	<b>Quality stage 1 &amp; 2 total:</b>	<b>80%</b>		
	<b>Price - 20%</b>	<b>100%</b>		
	<b>Quality and Price total</b>	<b>100%</b>		

The table below provides example score definitions that can be used during the evaluation process, you can adapt the mark score i.e. by using a 1 - 5 point scale. You may wish to include a minimum pass mark for questions considered vital.

Mark	Comment
<b>0</b>	Failed to provide confidence that the proposal will meet the requirements. An unacceptable response with serious reservations.
<b>25</b>	A poor response with reservations. The response lacks convincing detail with risk that the proposal will not be successful in meeting all the requirements.
<b>50</b>	Meets the requirements – the response generally meets the requirements, but lacks sufficient detail to warrant a higher mark.
<b>75</b>	A good response that meets the requirements with good supporting evidence. Demonstrates good understanding.
<b>100</b>	An excellent comprehensive response that meets the requirements. Indicates an excellent response with detailed supporting evidence and no weaknesses resulting in a high level of confidence.



## Contact us

For further information in relation to your brief and general advice about using Crown Commercial Service frameworks please contact our Customer Service Centre:

**0345 410 2222**

**[info@crowncommercial.gov.uk](mailto:info@crowncommercial.gov.uk)**

**[www.crowncommercial.gov.uk](http://www.crowncommercial.gov.uk)**



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