**ATTACHMENT J**

**SCOPE OF WORK**

**MARKETING, PUBLIC RELATIONS AND ADVERTISING SERVICES**

**A. MARKETING, PUBLIC RELATIONS AND ADVERTISING SERVICES**

The following terms apply to all Marketing, Public Relations and Advertising Services:

1. If the State Agency deems any final product unusable or unacceptable due to improper preparation of the mechanical(s), the Contractor shall be responsible for any and all costs associated with the reproduction of said product. Improper preparation shall include anything done incorrectly to the mechanical during its preparation that can cause printing to be compromised. All duplicate charges for the artwork will be rejected.
2. Contractor will ensure that all licensing agreements permit the State Agency to use the artwork or replace the photograph when it re-reruns a campaign.
3. The Contractor shall monitor and evaluate the progress and effectiveness of each advertising and public relations campaign. The Contractor shall suggest measurable criteria for evaluation that, in its judgment, should be used in determining the performance of each specific campaign. These criteria shall include, but not necessarily be limited to, such common measures as media impressions, awareness and utilization rates. The Contractor and State Agency shall agree on the criteria.
4. **The Contractor must obtain at least 3 competitive proposals/bids on all non-media expenditures.** For example, hiring a videographer to film and edit an event is an example of a non-media expenditure. **Documentation of the proposal process, including bids, must be submitted to the State Agency for pre-approval of all non-media expenditures.**
5. All invoicing received from the Contractor must have detailed support to include separate lines showing all billable transactions. Attachment M - Budget Summary Sheet - must accompany all invoices. The State Agency will not pay invoices that lack detailed support documentation. Delayed invoicing, billing, or payments due to lack of detailed support documentation with invoices is the responsibility of the Contractor. The Contractor is responsible for all payments to the subcontractor. To ensure the integrity of all campaigns the prime Contractor must, within 30 days of receipt of payment from the State, fulfill corresponding payment obligations to the subcontractors.
   1. **NO ADVERTISING ACTIVITIES SHALL BE CONDUCTED, MADE PUBLIC, OR DISSEMINATED WITHOUT PRIOR APPROVAL OF THE STATE AGENCY**.

**1. MARKETING AND PUBLIC RELATIONS SERVICES**

The Contractor shall assist in creative design, website programming/re-design or update, development and strategic planning for State Agency goals, marketing programs and public relations activities. This shall include supporting existing campaigns and programs, updating of existing designs or creating new designs, and creating new and fresh promotional campaigns as needed by the State Agency.

**PROCEDURE**

**The State Agency will prepare a Creative Brief (Attachment O), and submit to a minimum of 3 of the awarded vendors in Category 1 – Marketing, Public Relations and Advertising for a bidding opportunity. Each of these vendors shall prepare a Budget Quotation Sheet (Attachment M) and a detailed marketing and / or public relations Proposal. The State Agency shall develop a Scope of Work sub-agreement (Attachment P), based on the approved Budget Quotation Sheet and the approved Proposal, with the vendor that has demonstrated the best ability to meet the State Agency’s strategic communications objectives within the allotted budget.**

1. For engagements requiring the creation, implementation, modification, or management of a website, the Contractor and the State Agency must have Indiana Office of Technology approvals.
   1. **The Contractor will provide the State Agency final print, web ready and native files at the completion of each job. All files are the property of the State of Indiana.**
2. The Contractor, with State Agency approval, will prepare and execute a marketing and public relations campaign plan that parallels and complements the objectives of the entire customer information and goal campaign. Included in the plan shall be measures and targets to track the impact of public awareness and customer promotions in relation to the success of the campaign.
3. The Contractor shall also suggest program promotions for the rollout of the campaign, and after approval by the State Agency, work to plan and execute these promotions.
4. The Contractor shall identify and recommend changes to optimize campaign goals set by the State Agency based on public participation, input, and feedback on the program.
5. The Contractor will develop Strategic Planning for advertising, marketing and communications activities.
6. The Contractor shall identify and pursue new and feature placement opportunities and pitch stories to all forms of media with approval of the State Agency.
7. The Contractor may be asked to produce and place press releases and matte releases in daily and weekly newspapers, including the minority press, periodicals, newsletters, trade press and national and international publications.
8. The Contractor shall recommend, as appropriate, events to launch, roll out and conclude campaigns and, after approval from the State Agency, plan and execute these events.
9. The Contractor shall develop marketing plans and campaigns consistent with Agency goals and objectives.
10. Campaigns will be designed and implemented to reach specific target audiences. Target audiences might include populations that have been identified as disparate by evaluation data, ethnic minority populations and other target populations as deemed appropriate by the State Agency. Messages must be designed to reach specific target audiences as identified by the State Agency. Messages must be culturally appropriate and easily understood by all literacy levels.
11. Broadcast, radio, website and collateral creative design execution and production will be accomplished by the Contractor with approval of the State Agency. Print creative design will be accomplished by the contractor. Print production requirements are detailed in section 1.4.4 D. PRINT PRODUCTION of the RFP document.
12. The Contractor will provide expertise in the area of event planning.
13. The Contractor will use good faith efforts to obtain the most cost-effective buy-outs and talent agreements whenever possible, but especially in cases when additional uses of advertisements and their components are anticipated (i.e. submission to other agencies or other states’ potential use).
14. The Contractor shall implement the marketing plan State materials created by the vendor and /or pre-produced media materials.
15. The Contractor shall provide Public Relations services to help generate public interest and awareness for Agency programs/initiatives that benefit Hoosiers, or to help achieve the State Agency’s strategic communications objectives. This includes publicizing the activities and projects of other vendors contracted by the State Agency and, as funding permits, other projects that are related to agency programs/initiatives.
16. Creative concepts and specific messaging may be thoroughly tested through cognitive groups, focus groups, polling and other methods, prior to production. All campaigns will be designed with input from the State Agency and only implemented upon approval from the State Agency.
17. Upon approval of each public relations plan, the Contractor shall arrange for the production, use, dissemination and distribution of various forms of communication, literature, publications and public relations materials called for in the plan and approved by the State Agency. Prior to use, all materials shall be approved by the State Agency in advance of production deadlines.
18. The Contractor shall provide the State Agency with copies of all public relations materials that are placed and distributed by the Contractor. All such materials are to have been approved by the State Agency prior to placement or distribution.
19. The Contractor shall execute all contracts with the media and other third parties, including the negotiation of the best possible rates for any such project-specific contracts, when required. All such project-specific contracts shall be entered into as an independent contractor and not as an agent of the State. *All cost benefits must be passed to the State***. The Contractor shall submit separate line percent net cost with its invoice for all media placement under this contract. Contractor’s markup shall only apply to the net cost for media placement.** The State shall retain the right to audit the Contractor’s books to verify that the State is receiving all net prices, discounts and rebates.
20. The Contractor shall provide written project status reports on either a weekly, bi-weekly, or monthly basis as required by the State Agency.
21. In offering the best value to the State, the Contractor shall consider participation in, or development of, joint promotions, cooperative advertising and co-promotions. Where such opportunities exist, the Contractor shall provide the State Agency with critical details including potential value. The State Agency shall have final approval on all such opportunities.
22. The Contract must make the State Agency aware of any possible sponsorships, public outreach, or other external partnerships. The cost-efficiency of any such sponsorship or partnership, and the sponsorship or partnership value to the State Agency must be included.
23. The Contractor shall participate in periodic conference calls with the State Agency to review the status of current projects and address programmatic details and issues to ensure timely delivery and successful outcomes of all campaigns. Frequency of conference calls will be determined by the State Agency.
24. Following submission of public relations material to the media or other third parties, **the Contractor shall examine or audit the placements released through the various media outlets to verify that quality, timing, position and distribution are consistent with the media plan and schedule. The Contractor shall provide verification to the State Agency.**
25. **Social Media Marketing** is listed in this RFP as **Attachment I** and is inclusive in this category and terms are inclusive.
26. **Media Buying as listed in this RFP as a separate category is also encompassed in the Advertising, Marketing and Public Relations category and terms are inclusive.**
27. The Contractor shall provide consultation on and development of Internet marketing opportunities and trends. The Contractor shall be experienced in designing and executing internet marketing activities and evaluating trends in the internet medium. Internet marketing services may include, but not be limited to:
28. Developing and executing interactive customer retention and acquisition strategies for the State Agency services, and social networking sites.
29. Assisting the State Agency in developing and executing social media strategies by campaign and on an on-going basis.
30. Reviewing and evaluating all internet-related media proposals.
31. Evaluating all State Agency product activities to identify effective internet marketing opportunities
32. Assisting the State Agency in developing and executing other business communication and retailer support web-based solutions
33. Providing analytics for internet campaigns at a mutually agreed upon frequency
34. The Contractor shall prepare preliminary creative materials, as planned and scheduled, and present them to the State Agency for approval. Additional approaches may be requested by the State Agency at any time during the review and approval process.
35. Creative materials that are overly similar will not count toward the creative approaches. The State of Indiana expects different/fresh approaches.
36. The Contractor shall furnish clear and complete printing specifications to the State Agency for each proposed printing item. The specifications shall include factors such as size, quantity, paper stock, color of inks, copy, layouts, artwork and mechanicals.
37. The Contractor shall charge only one time for all artwork or logo, electronic or otherwise, that may be used in multiple forms, formats and software applications.
38. If the State Agency deems any final product as unusable or unacceptable due to improper preparation of the mechanical(s), the Contractor shall be responsible for any and all costs associated with the reproduction of said product. Improper preparation shall include anything done incorrectly to the mechanical during its preparation that can cause printing to be compromised. All duplicate charges for the artwork will be rejected.
39. Contractor will ensure that all licensing agreements permit the State Agency to use the artwork or replace the photograph when it re-reruns a campaign.
40. Talent acquisition licensing fees shall be disclosed to and approved by the State Agency prior to campaign budget approval.
41. The Contractor shall monitor and evaluate the progress and effectiveness of each advertising and public relations campaign. The Contractor shall suggest measureable criteria for evaluation that, in its judgment, should be used in determining the performance of each specific campaign. These criteria shall include, but not necessarily be limited to, such common measures as media impressions, awareness and utilization rates. The Contractor and State Agency shall agree on the criteria.
42. The Contractor will provide website consultation, development, programming, quality control, change control and content management.
43. The Contractor will provide research consultation and analysis.
44. The Contractor will provide evaluation, consultation, and professional recommendation concerning emerging media outlets, promotional services, sponsorship opportunities, merchandising aids and devices, and proposed concepts that might assist the State Agency in fulfilling its mission.
45. The Contractor, at the State Agency’s request, will provide assistance in developing and updating an annual Marketing Plan and Annual Sales Plan.
46. The Contractor will provide program and campaign-specific development of advertising and communications plans to support the marketing plan.
47. The Contractor will provide budget control and shared responsibility for cost control.
48. The Contractor will provide Public Relations services including situation analysis, communications advice, writing for press and public consumption, media relations, and in-person support for key State Agency communications and promotional initiatives.
49. The Contractor will assist the State Agency in procuring necessary media contracts, promotional partnerships, printed materials (see section 1.4.4 D. PRINT PRODUCTION of the RFP document)durable retail signage, and various collateral and sales aids related to the State Agency’s ongoing advertising and retail marketing programs in compliance with the State’s procurement laws.
50. The Contractor will provide photography and / or videography of events when requested by the State Agency.
51. The Contractor will provide crisis management as requested by the State Agency.

ss. **The Contractor must obtain at least 3 competitive proposals/bids on all non- media expenditures.** For example, hiring a videographer to tape and edit an event is an example of a non-media expenditure. **Documentation of the proposal process, including bids, must be submitted to the State Agency for pre- approval.**

tt. All invoicing received from the Contractor must have detailed support to include separate lines showing all billable transactions. Attachment M Budget Summary Sheet must accompany all invoices. The State Agency will not pay invoices that lack detailed support documentation. Delayed invoicing, billing, payments due to lack of detailed support documentation with invoices is the responsibility of the Contractor. The Contractor is responsible for all payments to the subcontractor. **To ensure the integrity of all campaigns, the prime Contractor must, within 30 days of receipt of payment from the State, fulfill corresponding payment obligations to subcontractors.**

* 1. **NO MARKETING OR PUBLIC RELATIONS ACTIVITIES SHALL BE CONDUCTED, MADE PUBLIC, OR DISSEMINATED WITHOUT THE APPROVAL OF THE STATE AGENCY.**

**2. ADVERTISING SERVICES**

The Contractor shall recommend and develop creative, research-based advertising objectives and strategies targeted to designated markets and / or the general public in coordination with the State Agency advertising goals and programs.

**PROCEDURE**

**The State Agency will prepare a Creative Brief (Attachment O), and submit to a minimum of 3 of the awarded vendors in Category 1 – Marketing, Public Relations and Advertising for a bidding opportunity. Each of these vendors shall prepare a Budget Quotation Sheet (Attachment M) and a detailed Advertising Proposal. The State Agency shall develop a Scope of Work sub- agreement (Attachment P, based on the approved Budget Quotation Sheet and the approved Proposal, with the vendor that has demonstrated the best ability to meet the State Agency’s strategic advertising objectives within the allotted budget.**

1. **The Contractor will provide the State Agency final print, web ready and native files at the completion of each job.** **All files are the property of the State of Indiana.**
2. The Contractor shall provide the creative, account and production personnel required to plan, design, execute and administer approved advertising, promotions, and public relations programs based on strategic marketing plans and the targeted consumer base.
3. The Contractor shall design and produce integrated media advertising campaigns with budgets, schedules and products that are based on unique selling propositions, creativity, relevancy, market research, cost effectiveness, target market reach and frequency, and program development.
4. The Contractor shall include Spanish and other language translations of consumer-oriented print materials as requested.
5. Upon completion and approval of the detailed plan, or portions thereof, the Contractor shall arrange for the use, dissemination and distribution of the various forms of communication, literature, publications and advertising materials called for in the plan, as approved by the State Agency.
6. The Contractor shall assist in the development and administration of programs that complement the State Agency’s unique goals to target specific customers and potential users.
7. Under the direction of the State Agency, the Contractor may be requested to produce creative execution for outdoor, online, broadcast media, website, collateral and other advertising as well as provide professional consulting and other related services as identified by the State Agency.
8. The State Agency shall direct the Contractor on the placement of all media purchased for the State Agency’s campaign. The State Agency reserves the right to make all determinations regarding the actual placement of all media. The Contractor shall purchase and place all media (newspaper, television, radio, Internet, social media, etc).
9. The Contractor shall coordinate with the State Agency on existing research data to provide pre-campaign analysis and topics for primary marketing research such as focus groups and surveys. Contractor shall provide requested post-campaign analysis as requested by the State Agency.
10. The Contractor shall produce strategic advertising schedules for outdoor and electronic media, create for approval, copy for all creative concepts for television and outdoor advertisements, and place such, if required, according to the State Agency approved estimates and schedules.
11. The Contractor shall supply photography and videography services as needed and approved by the State Agency.
12. If selected as part of the media mix, the Contractor shall create, produce and distribute:
    1. Outdoor advertisements
    2. Radio spots
    3. Print advertising
    4. Television commercials
    5. Internet advertisements
    6. Collateral and other advertisements
    7. Social media
13. The Contractor shall be responsible for the development, subcontracting, management, and execution of all required marketing research programs. These services may include, but are not limited to, web based surveys and analytics, media research, demographic studies, advertising concept testing and/or consumer segmentation studies. All such programs and services shall be approved in advance by the State Agency.
14. The Contractor shall provide data analyzing the impact of its campaigns to the State Agency on a mutually agreed upon schedule. These data reports shall include analytics to demonstrate the number of new visitors and, where applicable, dollars expended by them.
15. Prior to each project, the Contractor shall provide the State Agency with a Budget Quotation Sheet (see Attachment M) which includes outlining the background, strategy, objectives, target audience(s), scope of work, budget, deliverables, timeline and measurement criteria for outcomes to be achieved in the course of each specific campaign.
16. The Contractor shall provide the State Agency with reports concerning the rationale and recommended media buys for each project, including budget flight dates, reach and frequency data, and location and outlet information.
17. The Contractor shall provide the State Agency with copies and tear sheets of all print insertion orders and broadcast orders that are placed by the Contractor. The Contractor shall also provide electronic and print or recorded copies of all final advertising and promotional materials.
18. The Contractor shall provide written project status reports to the State Agency on a monthly basis, or at a frequency determined by the State Agency.
19. The Contractor shall participate in periodic conference calls with the State Agency to review the status of current projects and address programmatic details and issues to ensure timely delivery and successful outcomes of all campaigns. Frequency/mode determined by State Agency.
20. Upon approval of the required detailed advertising plan by the State Agency, the Contractor shall arrange for the production, use, dissemination, and distribution of various forms of communication, literature, publications and advertising materials called for in the plan. Prior to use, all these materials must be submitted in advance of production deadlines for the Contractor for approval by the State Agency. Requirements for the production of printed materials are detailed in section 1.4.4 D. PRINT PRODUCTION of the RFP document.
21. Following submission of advertising material to the media or other third parties, the Contractor shall examine or audit the advertising and media placements released through the various media to verify that quality, timing, position and distribution are consistent with the media plan and schedule.
22. **Media Buying as listed in this RFP as a separate category is also encompassed in the Marketing, Advertising and Public Relations category and terms are exclusive.**
23. The Contractor shall prepare preliminary creative materials, as planned and scheduled, and present them to the State Agency for approval. Additional approaches may be requested by the State Agency, at any time, during the review and approval process.
24. Creative materials that are overly similar will not count toward the creative approaches. The State of Indiana expects different/fresh approaches.
25. The Contractor shall furnish clear and complete printing specifications to the State Agency for each proposed printing item. The specifications include factors such as size, quantity, type of paper stock, color of inks, copy, layouts, artwork and mechanicals.
26. The Contractor shall charge only one time for all artwork or logo, electronic or otherwise, that may be used in multiple forms, formats and software applications.
27. The Contractor shall provide proofreading services for all advertising media publications and broadcasts.