**TEMPLATE**

**Request for Proposals**

**Community-Based Social Marketing Professional Services**

**SUMMARY**

[ORGANIZATION/AGENCY] invites proposals from qualified firms to develop, implement, and evaluate (or to support ORGANIZATION/AGENCY staff in the development, implementation, and evaluation of) community-based social marketing (CBSM) strategies to promote behaviors that contribute to [DESIRED OUTCOME] (e.g. reduced energy consumption, reduced water usage, increased recycling rates) in [GEOGRAPHIC AREA].

**PROJECT PURPOSE AND BACKGROUND**

The organization or agency issuing the request should include a statement that describes the project purpose and background. The statement should:

Describe the organization or agency soliciting the proposals;

Describe the desired behavior change outcome the agency or organization wants to achieve and the impetus for the desired behavior change;

Explain the specific geographic parameters of the project, the historical context, and any related work already completed;

Cite any laws, regulations, or policies relevant to this project along with any regulatory requirements, targets, or goals;

Name and describe the role of participating partners or stakeholders (if applicable); and

Include other relevant background information as appropriate.

**SCOPE OF SERVICES**

[ORGANIZATION/AGENCY] seeks services for each of the CBSM phase(s) indicated below.

* PHASE ONE: Behavior Prioritization
* PHASE TWO: Barrier/Benefit Research and Strategy Recommendations
* PHASE THREE: Strategy Design
* PHASE FOUR: Pilot Testing
* PHASE FIVE: Implementation and Evaluation

**🞏 PHASE ONE:** **Behavior Prioritization**

Proposer must outline the methodology they will use to complete the following tasks related to **identifying and prioritizing target behaviors.**

* Identify the key sectors and their relative contribution to the BEHAVIOR CHANGE OUTCOME.
* Identify end-state, non-divisible behaviors that contribute to the BEHAVIOR CHANGE OUTCOME within relevant sectors.
* Conduct research to assess and prioritize behavior(s) key to achievement of the BEHAVIOR CHANGE OUTCOME.
* Prioritize behaviors based on a quantitative analysis of their applicability, potential impact, existing levels of penetration, and probability of engagement.

Research methodologies may include literature reviews, case study reviews, technical information, observations, surveys, and/or expert interviews as appropriate.

**Phase One Deliverables:** At completion of Phase One, Proposer should deliver a report which includes the following:

* A description of the methods used to identify key sectors and prioritize behaviors;

* A copy of any research tools employed (e.g. survey templates); and,
* A summary of key outcomes and proposed next steps for barrier/benefit research.

**🞏 PHASE TWO: Barrier/Benefit Research and Strategy Recommendations**

Proposer must outline the methodology they will use to complete the following tasks related to **identifying the barriers and benefits to one or more target behaviors.**

* Identify and define behavioral chains, where applicable;
* Conduct research to determine, for relevant sectors, the barriers/benefits to engaging in prioritized behavior(s);
* Identify audience segments based on identified barriers/benefits;
* Prioritize the identified barriers;
* Identify the target behavior(s) and associated target audience(s) with the greatest potential to achieve the desired BEHAVIOR CHANGE OUTCOME;
* Describe appropriate behavior change tools and how each will address the barriers/benefits; and,
* Develop a strategy table that ties each key research outcome to proposed strategy elements.

Research methodologies for the above should include, at a minimum, literature reviews and, observations, focus groups, and/or quantitative surveys, as appropriate.

**Phase Two Deliverables:** At completion of Phase Two, Proposer should deliver a report which includes the following:

* A description of the methods used to determine barriers/benefits to engaging in prioritized behavior(s);
* A copy of any research tools and materials employed (e.g. survey templates, focus group results);
* An analysis showing how results from Phase One and Phase Two support selected target behavior(s) and target audiences;
* A strategy table for each target audience; and
* A summary of key outcomes and proposed next steps.

**🞏 PHASE THREE: Strategy Design**

Proposer must outline the methodology they will use to complete the following tasks related to **strategy design.**

Proposer should develop one or more behavior change interventions consisting of strategies designed to overcome target audience barriers to participation in target behavior(s) and enhance target audience motivation to engage in desired behavior. Strategy development should directly address the identified barriers/benefits and include appropriate tools for behavior change (e.g., commitment, social norms, prompts) as appropriate. Strategies should be designed to address the most important barriers and benefits for each identified audience.

* Create strategy materials including any graphics, print materials, electronic media, promotional items, etc.;
* Identify key messages, materials, channels, and messengers;
* Identify and describe metrics for evaluating the impact of the identified strategies;
* Pre-test strategy elements through small field experiments or focus groups; and
* If appropriate, gather stakeholder feedback on proposed behavior change strategies.

**Phase Three Deliverables:** At completion of Phase Three, Proposer should deliver a report which includes the following:

* A marketing plan that clearly describes the key messages, materials, channels, and messengers for each strategy to be pilot tested;
* Copies of all materials including any graphics, print materials, electronic media, promotional items, etc.;
* A description of the available metrics for evaluating the impact of the identified strategies (actual behavior change should be measured whenever possible, not just self-reported behavior change);
* A summary of focus group, stakeholder, or pre-pilot response to proposed behavior change strategies (plus a description of any strategy refinement prompted by this participant feedback); and
* A proposed plan for pilot testing one or more strategies.

**🞏 PHASE FOUR:** **Pilot Testing**

Proposer must outline the methodology they will use to pilot test one or more strategies developed in Phase Three. Whenever feasible, it is desirable to pilot test more than one intervention so that the most cost-effective strategy for bringing about the desired behavior change can be determined. This methodology should outline the procedures and tasks associated with pilot testing the intervention(s) on a small scale with members of the target audience.

**(A) Identify one or more intervention/strategy groups and control groups.** The pilot should include a Control Group (no intervention) and one or more Strategy Groups (intervention). When possible, participants should be randomly selected from the broader community to which the program will eventually be delivered. When possible, participants should also be randomly assigned to the control and intervention groups.

**(B) Conduct Baseline/Follow-Up Assessment.** Measure existing (baseline) and follow-up level of participation in the selected target behavior(s) for both Control and Strategy Groups. Include follow-ups at multiple points, where possible. Measurement methodologies could include analysis of existing behavior trends data, observation of target audience engagement in target behavior(s), and survey of the target audience.

During each measurement, analyze behavior change data and assess impact of piloted behavior change strategies on target audience. At a minimum, compare measured baseline, interim, and follow-up participation in target behavior(s) for both Control Group and Strategy Group(s).

**(C) Evaluate Return on Investment.** Calculate a cost per behavior change and, where feasible, a total Return On Investment for each of the tested strategies.

**Phase Four Deliverables:** At completion of Phase Four, Proposer should deliver a report which includes the following:

* Description of pilot test challenges and successes; and
* Summary of target behavior change that occurred during pilot as evidenced by measured baseline, interim and post-pilot behavior tracking data. Data should be analyzed statistically to ensure that differences between Strategy and Control Groups are statistically significant. In addition, results should be compared against real world needs (e.g., Is the behavior change assessed to be of a large enough magnitude to have real world significance?).

**🞏 PHASE FIVE**: **Implementation and Evaluation**

If measured outcome data shows significant improvement in Target Behavior participation by Target Audience, Proposer must put forward a plan to expand behavior change intervention to larger audience and evaluate results.

They should also describe if any strategies demonstrated to be effective in pilot testing could be developed into turnkey strategies for deployment by other agencies or organizations.

**Phase Five Deliverables:** At completion of Phase Five, Proposer should deliver a report which includes an implementation and evaluation plan for larger scale application.

**PROPOSAL CONTENT**

The proposal shall include the following information:

1. **General Information.** SubmitProposer’s complete name, business address, and telephone number and the name, mailing address, and telephone number of the person who should be contacted regarding the proposal.

2. **Organizational Information.** Formulate a description of the Proposer’s organization, including names of principals, number of employees, longevity, client base, areas of specialization and expertise, and any other pertinent information that will enable proposal evaluators to reasonably formulate an opinion about the stability and financial strength of the organization.

3. **Staff Qualifications and Experience.** List the key personnel who will be assigned to the project, including names, qualifications, and experience of the proposed project team. Provide evidence of: familiarity with designing and implementing community-based social marketing strategies; demonstrated knowledge of social science tools/strategies and their application to behavior change; and competence in survey design, program evaluation and data analysis. (At least one member of the project team should have graduate level training in research methods and statistics). Provide the same information for any sub-consultants who will be included as part of the proposed team.

4. **Similar Projects.** Provide a summary of at least (X) similar projects completed by the proposed team within the last 5 years. Project descriptions should include the following: (a) Description of efforts to identify and prioritize target behaviors; (b) Summary of barrier and benefit research methods and results; (c) An overview of key strategies and relevant behavior change tools; and (d) Description of pilot testing procedures and outcomes. Each project summary should also name the client, relevant services, budget, and schedule.

5. **References.** Provide three references for whom Proposer performed similar services of similar scope within the past three years. Include the organization name and address, the name and telephone number of a contact person, and a description of the relevant services performed.

6. **Project Approach.** Include a narrative statement that illustrates Proposer’s understanding of the project requirements. The proposal must be based upon community-based social marketing methods.

7. **Proposed Work Plan.** Give a narrative statement outlining Proposer’s intended methodology and how that methodology will deliver the described services. (For Phase One, specify how Target Audience and Target Behaviors will be selected and how Barriers and Benefits will be identified. For Phase Two, describe what behavior change tools might be used (e.g., commitment, prompts, norms, social diffusion, etc.), and how the selected strategy will be piloted. Specify how the program will be evaluated during and following implementation.

8. **Management Plan.** Describe the management plan Proposer intends to employ for the project and how this will support all project requirements and logically lead to the required deliverables. The description must include the organization of the project team, including accountability and lines of authority. Include an organizational chart.

9. **Timeline.** Include a timeline, gantt chart, or similar project plan for completion of the project. Include key project milestones, dates, and deliverables, as appropriate.

10. **Project Cost.** Articulate total cost for completion of the project described in this Request for Proposals and a proposed payment schedule.

**PROPOSAL EVALUATION CRITERIA**

Proposals will be evaluated by [EVALUATION TEAM] and scored according to the following criteria. **NOTE:** This is a list of suggested proposal criteria and could be modified as needed to meet agency/organizational goals or priorities and to reflect the requested scope of services.

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| Item | Criteria | Points |
| 1 | Experience performing similar work; Demonstrated success developing and implementing community-based social marketing efforts of a similar scope and scale. | XX |
| 2 | Experience and expertise of team members including knowledge of community-based social marketing and competence in survey design, program evaluation and data analysis; At least one member of the research team should have graduate level training in research methods and statistics. | XX |
| 3 | Proposed work plan demonstrates appropriate use of community-based social marketing methods; Proposed services specify methods for behavior selection and identification of barriers and benefits.  | XX |
| 4 | Proposer demonstrates knowledge of behavior change tools and their appropriate application. At least one member of the strategy development team should have graduate level training in behavioral science. | XX |
| 5 | Proposed work plan outlines an approach to pilot design. | XX |
| 6 | Proposed work plan specifies how the program will be evaluated once implemented throughout the community. | XX |