



# THE LAUNCH INTO THE NEXT DECADE

## REQUEST FOR PROPOSAL

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## STATEMENT OF PURPOSE

Over the past 38 years, Operation Smile has provided life-changing surgery and dental care for more than 300,000 patients with cleft conditions. We have a unique opportunity to bring our world together through children with facial deformities. However, knowing that there are 5 million people who need cleft care in the 35 countries where we work calls us to continue to innovate in the way we deliver care. The greater strain that the global pandemic has placed on health systems has accelerated Operation Smile's emphasis on programs that strengthen the local health infrastructure and enhance the skills of the health professionals – the real heroes behind our work.

Operation Smile will mark its 40<sup>th</sup> Anniversary with the launch of a ten-year plan to significantly expand our work in more than 35 countries. Achieving this level of impact will require the engagement and coordination of global and local leaders from all sectors of society. The goals of the 40<sup>th</sup> Anniversary are:

1. Launch an expanded set of medical programs that will increase access to surgical and comprehensive cleft care over the next decade.
2. Tell the story of how we have invested in our students and exposed them to unique leadership opportunities for them to continue to grow together with the organization.
3. Tell the global story of Operation Smile's evolution without losing its identity and culture.
4. Create greater awareness of Operation Smile's work and its vision for the future.
5. Position Operation Smile as a strong partner and collaborator for sustainable impact in the surgical and cleft care space.
6. Gain access to new funding and advocacy platforms that advance Operation Smile's philanthropic work.

Founded in 1982 by Dr. Bill Magee and Kathy Magee, on the commitment that anything is possible through trust and collaboration, Operation Smile is positioned to serve as a unique partner in the global health space. Operation Smile's brand strength and reputation is one of its biggest assets, second only to the power of its network of volunteers and supporters around the world. Like many global organizations, this success is driven by a balance between a unified global identity, and a locally driven solution model. The picture of a child with a repaired cleft condition holding a "before surgery" photo has been the hallmark of the organization's image and has successfully driven support and funding for decades. How do we harness this core identity as a cleft organization to tell a more in-depth story about the work in the decade ahead?

Operation Smile seeks a full-service communications agency to co-create and support the implementation of a global marketing and media relations campaign that drives sustained attention and funding to the organization during the year-long celebration of its 40<sup>th</sup> Anniversary. The selected agency will be onboarded in June 2021 to gear up for a press release in July 2021. The anniversary year will begin in November 2021 with monthly signature programs and events across selected countries around the world, ending with a closure event in November 2022.

## SCOPE OF WORK

Operation Smile's Strategy & Partnerships department will retain and manage the work of the selected agency. A Global Communications Committee, with representation from relevant departments and regions where Operation Smile works, will provide advice and coordination support to the selected agency to aid in the campaign's success.

### **1. *Global Communications Strategy***

The agency will develop a comprehensive communication strategy that includes:

- Overall communication of Operation Smile's strategic plan to convey the relevance of the 40<sup>th</sup> Anniversary goals and objectives across a variety of audiences.
- Assistance with message development around the world to ensure the campaign retains its identity throughout the year-long celebration.
- Identification of critical moments during the campaign that appeal to both United States, international, and in-country-based media.
- Reinforcement of Operation Smile's leadership position as one of the largest surgical volunteer-based nonprofits that improves the health and dignity of patients with cleft conditions. Through these surgeries we will increase the awareness and knowledge to enhance safety in surgery worldwide.

### **2. *Global Marketing Campaign:***

The agency will develop a marketing campaign that includes:

- Creation of a global marketing toolkit that can be customized for multiple languages and cultures, including digital and print assets.
- Global digital marketing campaign to be leveraged on social media platforms.

The agency will support with ongoing marketing campaign implementation that includes:

- Recommended budgets.
- Metrics and monitoring of tactical effectiveness, including recommendations for redirection and or reallocation of resources as needed.

### **3. *Global Media Relations:***

- Development of a media list in the United States and across selected countries, including Colombia, Ghana, Guatemala, India, Madagascar, Malawi, Mexico, Morocco, Peru, Philippines, and Vietnam.
- Identify and deliver on public relations opportunities in the United States and across selected countries, including Colombia, Ghana, Guatemala, India, Madagascar, Malawi, Mexico, Morocco, Peru, Philippines, and Vietnam.
- Preparation for crisis Media Relations strategy and issues management.
- Press Toolkit (including templated milestone press releases, customized pitch letters, message points for media interviews, and scripts for domestic television and radio public service announcements).
- Media training for selected executive leaders and spokespersons representing our global marketing teams.

### **4. *Media Planning & Management for Signature Events:***

Coordination of launch and closure events, including:

- Preparation of remarks for all event participants.
- Coordination of media relations and interviews.

Support with field events, including:

- Coordination of translations for press conferences, general interaction with the media, special events, including the creation of a fact sheet regarding the 40<sup>th</sup> Anniversary.
- Coordination of media cultivation efforts with in-country staff, including distribution and pitching of in-country media and execution of in-country press conferences.
- Preparation of in-country news releases, advisories and press conference speeches as needed. Potential on-location travel for small agency team to co-coordinate key events, including launch, closing, and any other key events.

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## TARGET AUDIENCES

- Major United States and international television, print, and digital outlets, such as CNN, BBC, Fox and others.
- Globally acclaimed news magazines, such as Forbes, Time, Foreign Policy, Foreign Affairs, and similar publications.
- Global health organizations, such as the United Nations and the World Health Organization.
- Ministries of health and in-country health agencies.
- Multinational corporations and global brands.
- High-profile individuals in global health, child health, and health policy space.
- Long-standing Operation Smile donors, volunteers, and supporters.

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## REPORTING EXPECTATIONS

### ***Monthly:***

- Provide monthly reports of campaign results to the Operation Smile's Global Marketing Committee and Senior Leadership team, including recommendations for redirection and reallocation of resources as needed.
- Provide monthly reports of media and public relations opportunities and coverage secured, and work with Operation Smile's Global Marketing Committee and Senior Leadership team to leverage existing connections.

### ***Weekly:***

- Provide weekly campaign reports of results to Operation Smile's Strategy & Partnerships team and key stakeholders.

### ***End of Engagement:***

- Provide overall campaign results and propose opportunities for sustained engagement of relationships secured through the campaign.

## ENGAGEMENT DETAILS

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### TERMS OF CONTRACT

#### ***Proposed start and end-service date:***

1 July 2021 – 30 November 2022

#### ***Termination of RFP***

Operation Smile reserves the right to terminate this RFP for convenience.

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### GENERAL PROVISIONS

- Amendments to RFP. Operation Smile reserves the right to amend the RFP or issue to all Respondents a Notice of Amendment to answer questions for clarification.
- No Commitment to Award. Issuance of this RFP and receipt of proposals does not commit Operation Smile to award a contract. Operation Smile expressly reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Respondent concurrently, or to cancel all or part of this RFP.
- Amendments to Proposals. No amendment, addendum or modification will be accepted after the deadline stated herein for receiving Proposals. However, respondents may modify or amend its Proposal only if Operation Smile receives the amendment within five (5) business days after the deadline stated below for receiving Proposals.
- Non-Responsive Proposals. A Proposal may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, or other irregularities that may constitute a material change to the Proposal.
- Late Proposal. Operation Smile will not be responsible for Proposals that are delinquent, lost, incorrectly marked, sent to an address other than that given herein, or sent by mail or courier service and not signed for or acknowledged by Operation Smile.
- Cost for Preparing. Operation Smile will not compensate any Respondent for the cost of preparing any Proposal.
- Alternate Proposals. Alternate and multiple proposals may be accepted, but we do seek that at least one (1) proposal is compliant with this RFP. Should an alternative proposal be submitted to accomplish the goals of this RFP, then it will be clearly identified and marked as an “Alternative Proposal”.
- Public Documents. All Proposals and all evaluations and/or scoring sheets shall not be available for public inspection at the conclusion of the selection process.
- Confidential: This RFP has been prepared by Operation Smile and is being given to you to provide you with an opportunity to bid. The information enclosed in this proposal is proprietary to Operation Smile. Operation Smile does not convey any ownership to any party by disclosing this information. By accepting this document, you agree (i) to treat this information as confidential, (ii) not to allow any other person or entity to see it or use it, (iii) not to use it in any way other than to prepare the requested proposal, and (iv) to return this document and all copies you have made of it to Operation Smile upon Operation Smile’s request.

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## OTHER RELEVANT INFORMATION

- Information about Operation Smile is available at <https://www.operationssmile.org/>
- The selected agency will receive a comprehensive overview of the 40<sup>th</sup> anniversary plans and campaign ideas, including Operation Smile's 10-year programmatic strategy for the decade.
- The selected agency will have access to the organization's digital database of photography and video assets, as well as additional assets to implement institutional messaging and positioning.
- Operation Smile will approve all deliverables created by the selected agency.
- Operation Smile expects that staff assigned to this account will serve diligently throughout the term of the contract or agency will provide a substitute in a reasonable period of time with similar skills, expertise, and subject matter know-how needed to advance the objectives of this engagement.
- Operation Smile expects regular and timely planning meetings, as needed.
- Any work (i.e., materials that accompany the proposal) will become the property of Operation Smile and cannot be shared without express prior written consent of Operation Smile.
- Proposing agencies are asked to certify that they have no conflicts of interest in serving Operation Smile.

## PROPOSAL REQUIREMENTS

All bidders must submit a PDF electronic copy of their complete proposal packet by email to:

Kristie Magee Porcaro, Chief Strategy Officer & Partnerships:  
[kristiep@operationssmile.org](mailto:kristiep@operationssmile.org)

with copy to:

Adriana Farias, Director, Strategy & Partnerships:  
[adriana.farias@operationssmile.org](mailto:adriana.farias@operationssmile.org)

Complete proposal packet must include:

### **1. General Agency Overview:**

- Please provide an overview of the agency, outlining key competencies and areas of work.
- Please list the experience and role of staff members who will work on this account. Please include titles, roles, responsibilities, and office location.
- Please provide references to past relevant work.
- Please provide client references from the non-profit sector, if applicable.
- Please provide an overview of the agency's approach to on-boarding and client management.
- Please describe how success is defined and measured.

### **2. Solution and Approach**

- Please include initial ideas and proposed strategy for achieving Operation Smile's 40<sup>th</sup> anniversary goals.
- Please include a sample plan of proposed activities for the campaign and/or samples of previous work.

- Please include a high-level statement of public relations strategy and potential VIP contact list, including access to press in select countries, including Colombia, Ghana, Guatemala, India, Madagascar, Malawi, Mexico, Morocco, Peru, Philippines, and Vietnam.

### **3. Cost Section**

- Please include an itemized budget specifying the anticipated deliverables the agency will provide, including budget associated with each major task, indicating the number of work hours required to complete the task by employee and the hourly rate.
- Please include the cost of any contract management or overhead charges or fees, and reimbursable expenses the agency may charge Operation Smile. Such cost must be specified in the budget proposal. Reimbursable expenses will include travel time, mileage reimbursements, meals, phone charges, consumables, and other related expenses agreed to in writing with Operation Smile.
- Please provide billing and expense practices, including a rate card that outlines what is/isn't billable.
- Please note that Operation Smile may ask for full disclosure in markup fees in order to better understand the cost and value of an agency's services.
- Production Mark-Up: Please list third party costs that are marked up with a surcharge and at what rate, if applicable.

## **TIMEFRAME FOR REVIEWING PROPOSALS**

### ***Deadline for Submitting the Proposal:***

15 April 2021

### ***Reviewing Period:***

Ongoing through 31 May 2021

### ***Decision will be made on:***

1 June 2021

Operation Smile will award the contract to the most competitive agency whose proposal is responsive to the Request for Proposal (RFP) and is deemed the most-aligned proposal to achieve Operation Smile's 40<sup>th</sup> anniversary goals.

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## **FACTORS THAT INFLUENCE OUR DECISION**

- Potential to provide a clear media strategy, branding, production, and analytics associated with a successful global campaign.
- Experience translating intricate concepts for a variety of audiences, breaking it down to its parts without losing sight of the whole.
- Experience leveraging the power of "glocal," one global voice that is seamlessly translated to local contexts.
- Experience working with nonprofits.
- Experience providing marketing support in the health or child advocacy space.
- Demonstration of effective communication and collaboration skills.

## POINTS OF CONTACT

Please send your inquiries to:

Kristie Magee Porcaro, Chief Strategy Officer & Partnerships:  
[kristiep@operationsmile.org](mailto:kristiep@operationsmile.org)

with copy to:

Adriana Farias, Director, Strategy & Partnerships:  
[adriana.farias@operationsmile.org](mailto:adriana.farias@operationsmile.org)