



Contract Policy Notice 2003-1 – Revised Policies Related to Contracting for Advertising and Public Opinion Research Services (Archived)

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FILE NO.: CB 3855-002

DATE: January 10, 2003

TO: Functional Heads, Administration / Finance of all Departments and Agencies

SUBJECT: Revised Policies Related to Contracting for Advertising and Public Opinion Research Services

SUMMARY OF POLICY CHANGES

1. Treasury Board policies related to advertising and public opinion research, namely the *Contracting Policy* and the *Common Services Policy*, have been amended effective January 1, 2003. The revisions aim to strengthen and clarify the policies to achieve more effective and competitive approaches to contracting for these services.
2. As a result, Appendix Q of the Contracting Policy, Supplementary Policy and Guidelines with Respect to Contracting Procedures for Public Opinion Research and Advertising Services, has been eliminated. Key policy provisions pertaining to advertising and public opinion research are now included in section 16.13 of the Contracting Policy.
3. Definitions of advertising and public opinion research are included in this new section. It should be noted, however, that co-sponsorship activities are no longer covered by this policy. Further direction and guidance is provided in the Treasury Board Communications Policy. Key obligations to be noted also include the roles of Communication Canada and Public Works and Government Services (PWGSC) as mandatory service providers.

4. The wording for new section 16.13 of the Contracting Policy dealing with contracting of advertising and public opinion research services is attached at Annex 1.
5. The Common Services Policy has also been revised to reflect the roles and responsibilities of Communication Canada PWGSC. Coordination of government advertising and public opinion research activities is a mandatory common service provided by Communication Canada. Contracting for advertising and public opinion research will remain a mandatory common service for PWGSC.
6. A key change of the Common Services Policy is the elimination of a mandatory policy requirement to use a single agency of record for the government's media placement activities.
7. The revised wording of the Common Services Policy dealing with the management and contracting of advertising and public opinion research services is attached at Annex 2.

IMPLEMENTATION

8. These policy changes are effective January 1, 2003. PWGSC will be working with departments to establish new procurement instruments related to advertising requirements in the next few months. Communication Canada and PWGSC are working with the communications community to complete this work. The Treasury Board Secretariat (TBS) will also provide information to the contracting community through the Treasury Board Advisory Committee on Contracts.
9. To ensure that the system works as intended and the policy changes are fully implemented, Communication Canada and PWGSC will complete an audit of the system related to advertising two years after the creation of the renewed procurement instruments and an audit of public opinion research activities once other key audits and reviews are finalized.
10. Departments remain responsible for ensuring that their expenditures in these areas fully comply with Treasury Board policies and the Financial Administration Act, most specifically sections 32, 33 and 34 of the Act. Departments must ensure that appropriate management systems and measures are in place for

the approval of contracts, the receipt of these services and the payment of invoices.

CONTRACTING POLICY WEBSITE

11. This Contract Policy Notice and the revised Contracting Policy are available on the TBS Website (www.tbs-sct.gc.ca), under the Policies and Publications Contracting section. The updated Common Services Policy is available on the TBS website, under the Policies and Publications Common Services section.

ENQUIRIES

12. For policy advice and guidance, please contact:
Treasury Board Secretariat at
(613) 957-2487.

Roberta Santi
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Distribution : TB06, TB07, TB21, TB23, T022, T023, T024, T083, T161, T222 et T223.

Attachments include:

Annex 1 – Revised wording for *Contracting Policy*

Annex 2 – Revised wording for *Common Services Policy*

ANNEX 1

Wording Included in the Main Contracting Policy to Replace Deleted Appendix Q

4.2.21 Related Requirements

All contracts for public opinion research and advertising must be entered into according to the requirements set out at section 16.13 of the Contracting Policy.

16.13 Contracting for Advertising and Public Opinion Research Services

16.13.1 When contracting for public opinion research and advertising, reference should also be made to the Communications Policy, the Common Services Policy and the Management of Government Information Holdings Policy.

16.13.2 At the beginning of a project planning process for public opinion research and advertising, departments and agencies must notify Communication Canada, if the project may result in the award of a contract. A project registration number will be provided by Communication Canada to authorize Public Works and Government Services Canada to award a contract for these services on behalf of departments.

16.13.3 Public Works and Government Services Canada is responsible for awarding public opinion research and advertising contracts.

16.13.4 As part of its contracting responsibilities, Public Works and Government Services Canada ensures that a significant level of Canadian participation is achieved by having the advertising work performed in Canada in a manner consistent with the nature of the requirements.

16.13.5 Advertising is defined as:

- All activities involved in the purchase, by or on behalf of the government, for the development and production of advertising campaigns and associated space or time in print or broadcast media, or in other mass media, such as outdoor and transit advertising.
- It also includes any collateral materials such as posters, counter displays, and printed material such as inserts that are a direct extension of an advertising campaign. Public Service Announcements are also considered advertising.
- Public relations, special events, direct marketing and promotion activities that are an extension or form part of an advertising campaign are included in the definition of advertising.

- Paid announcements such as public notices regarding tenders, sales, public hearings, offers of employment, and business hours and addresses may be placed directly with the media by departments and agencies.

16.13.6 Public Opinion Research is defined as:

- The planned gathering, by or for a government institution of opinions, attitudes, perceptions, judgements, feelings, ideas, reactions, or views that are intended to be used for any government purpose, whether that information is collected from persons (including employees of government institutions), businesses, institutions or other entities, through quantitative or qualitative methods, irrespective of size or cost.

16.13.7 The information gathering may be associated with a broad range of activities for example:

- Policy research;
- Market research;
- Communications research, communication strategies and advertising research;
- Program evaluation;
- Quality of service/customer satisfaction studies;
- Omnibus surveys (placement of one or more questions);
- Syndicated studies; or
- Product development.

16.13.8 The following research and/or methods for obtaining opinions and/or advice are not considered to be opinion research:

- Literature reviews or reviews of secondary sources, including reviews of already conducted public opinion research;
 - Secondary analysis of previously collected public opinion research data; and
 - Verification of performance of services or delivery of goods in contract situations.
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ANNEX 2

Revisions to the Common Services Policy

(These are largely housekeeping changes arising from the Creation of Communication Canada)

New Section 2 - Communication Canada

When contracting for public opinion research and advertising, reference should also be made to the Communications Policy, the Contracting Policy and the Management of Government Information Holdings Policy.

2.2◆◆◆ Advertising

Coordination of government advertising activities is a mandatory service provided by Communication Canada.

As a common service organization, Communication Canada provides departments and agencies with a number of communication services to ensure overall consistency with government policies and priorities. Communication Canada assists departments and agencies in monitoring the public environment and in responding to citizen needs for information on the government's overall direction, priorities and broad range of policies, programs, services and initiatives. In advertising, the focus is on ensuring coherence in government messaging, appropriate staging of campaigns, the quality of campaigns and adherence to key government standards as set out in key policies and legislature (e.g. the Communications Policy and the Official Languages Act).

This role includes:

- Reviewing departmental plans as specified in the Communications Policy. Departments must submit their advertising plans to Communication Canada upon request;

- Assigning a project registration number authorizing PWGSC to contract for advertising or media placement services on behalf of departments;
- Reviewing pre-test and post-campaign results for major advertising campaigns;
- Providing advisory services to departments and agencies for advertising agency selection, media planning, budgeting, creative design and related administrative procedures.

Before entering into any advertising contracts, departments must consult Communication Canada. Communication Canada coordinates its activities with Public Works and Government Services Canada who is responsible for awarding advertising contracts.

Paid announcements such as public notices regarding tenders, sales, public hearings, offers of employment, and business hours and addresses may be placed directly with the media by departments and agencies.

A definition of advertising is provided in section 16.13 of the Contracting Policy.

2.3 Public Opinion Research

Coordination of government public opinion research activities is a mandatory service provided by Communication Canada.

Departments use public opinion research to better understand Canadian society and to identify citizen needs and expectations. It is used to assess the public's response to proposals or to possible changes or initiatives; to assess the effectiveness of policies, programs and services; to measure progress in service improvement; to evaluate the effectiveness of communication activities such as advertising; and for marketing purposes, among other applications.

It is Communication Canada's mandate to coordinate public opinion research activities, as well as to advise and inform on effective related practices and policies.

This role includes:

- Reviewing departmental plans as specified in the Communications Policy.
Departments must submit their public opinion research plans to

Communication Canada upon request;

- Providing advisory services to departments and agencies;
- Reviewing proposed projects to ensure consistency with government priorities;
- Assigning a project registration number authorizing PWGSC to procure public opinion research services on behalf of the department.

Before entering into any related contracts, departments must consult Communication Canada concerning all decisions to undertake government information collection that qualifies as, or contains a significant component of public opinion research. Communication Canada coordinates its activities with Public Works and Government Services Canada who is responsible for awarding public opinion research contracts.

A definition of public opinion research is provided in section 16.13 of the Contracting Policy.

Section 6 - Public Works and Government Services Canada

6.6 Advertising

Contracting for advertising is a mandatory service provided by Public Works and Government Services Canada working in collaboration with Communication Canada. It should be noted that advertising does not include paid announcements such as public notices regarding tenders, sales, public hearings, offers of employment, and business hours and addresses that are placed directly with the media by departments and agencies.

6.7 Public Opinion Research

Contracting for public opinion research is a mandatory service provided by Public Works and Government Services Canada working in collaboration with Communication Canada.

Date modified: