



Australian Government

Department of the Prime Minister and Cabinet
Government Communications Unit

How to Write a Brief for a Graphic Design Consultant

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Getting Started

Prior to writing a brief for a graphic design consultant, you will have carried out research to identify and better understand your target audience, including their current levels of knowledge, attitudes, motivations and information needs. Depending on the size of the project, some or all of this background information will be useful in briefing the graphic designer.

The value of a good brief

The quality of your brief is the key to receiving, in return, high quality, tightly focused proposals. It provides the foundation upon which graphic designers can plan and cost their activities.

A comprehensive brief will help in evaluating competing proposals and in ensuring that the selected consultant fully understands the scope of the work involved.

The brief and the successful designer's proposal are used as the basis for developing a contract and, as such, the brief attains a legal status.

How much information should you provide?

The items listed in the checklist provided below are a guide to the information you should be providing to the graphic designer. Some items may not be necessary – it depends on the complexity of the project. Notes relating to each item are set out in the following pages.

	Checklist	
1.	Purpose	
2.	Background	
3.	Target Audience	
4.	Objectives	
5.	Tasks	
6.	Special Considerations	
7.	Type of Software/Hardware used	
8.	Budget	
9.	Timeline	
10.	The Consultant's Proposal	
11.	In-house Resources	
12.	Selection Criteria	
13.	Q&A Sessions	
14.	The Pitch	
15.	Terms of Business	
16.	Contacts	

Note

You should note that when procuring services valued over \$2000, Australian Government departments are required to obtain a DUNS number. This is outlined in Commonwealth Procurement Circular 97/7. For more information on DUNS numbers and how to obtain them contact GCU or your purchasing area.

1. Purpose

State why you are sending out the brief.

For example:

You are invited to submit a proposal to design a corporate image for the Office of Government Information and Advertising.

2. Background

Provide a broad outline of the circumstances that prompted the need or the opportunity to communicate.

For example:

As part of a marketing strategy we would like to update our corporate image to more closely reflect our needs, and the expectations of various client departments and organisations in the communication industry with which we deal on a regular basis.

You should also attach to your brief any supporting material on your graphic design project that could be useful to the consultants.

Current materials

These could include such items as brochures, manuals and past videos, photographs of office locations, corporate image requirements of the portfolio and anything else you feel might be helpful.

Research & evaluation

Include details of any research that is available to the consultant as well as information about how you plan to evaluate your information activities.

This could range from internal desk research to market research or statistical information. You should attach an executive summary of any research you have done which is not too sensitive to release.

When you want consultants to develop products such as a brochure or a logo, you should consider testing these products with your target audience. If the brochure is unattractive to your target audience, or the information is not clear, you may end up wasting your money. You should plan to test products before they are finalised, state this in the brief so consultants can plan their production timetable to allow for the testing.

3. Target Audience

Who do you want to receive your message?

Describe your target audience/s in terms of current behaviour and levels of awareness and knowledge. Then describe the desired levels of each of the variables. In other words, describe the current situation and how you want it to change as a result of your campaign/project.

You should avoid defining your target audience too broadly with statements such as 'the general Australian community', as broad approaches are less likely to be successful.

Special audiences

Government departments are required to take into account that some Australians are disadvantaged through low income, poor education, inadequate knowledge of English, disability or geographical isolation.

In practical terms, for graphic design, this means that your logo or corporate image may need to be designed for legibility as well as aesthetic considerations. You should choose a typeface which can be read by people with poor sight, or provide an alternative source of information. Your corporate image should attract, not repel, your clients and stakeholders. If in doubt, test your image with the target audience, or seek the advice of special interest groups.

4. Objectives

State what you want to achieve from your communication activities.

It is important to clearly define your communication objectives, so consultants know what you hope to achieve.

For example:

To provide attractive, easily understood materials about Abstudy to all eligible high-school students.

Key message

Defining your key message will clarify your thinking and will assist in your communication with clients, consultants and management. If you don't have a clear, concise understanding of the campaign/project purpose, then the lack of clarity will be exaggerated as the campaign progresses. This could result in weak creative proposals.

Your key message statement is not the 'slogan' or the 'jingle' for your communication campaign or the actual words you will use as your message – your role is to capture the essence of what needs to be communicated. Later, with concept testing research, you will be able to refine your message into one that will be set in terms or language immediately recognisable by your target audience.

A message suitable for a graphic design project might be something like:

GCU is a professional, responsive, organisation that supports leading-edge communication and design. We are early adopters of technology.

This would probably attract a friendly but high-tech design solution, possibly geometric, with hi-tech foiling, glossy stock.

5. The Task

Clearly outline what it is you want the consultant to do.

For example:

- cost, develop and/or produce a strategic graphic design plan which will support the objectives of specific activities nationally within 'x' context;
- produce 'x' copies of the handbook in 'y' format; or
- design the corporate image of 'x' organisation, produce camera ready art for letterhead, envelopes, compliment slips, business cards, internet home page, publications, and manage the printing and production processes.

Including a specification

If you have a very clear idea about what you want, include as many details about the physical attributes and requirements of the project as you can. One example would be the specifications for a brochure as described below.

Specification	Examples
Item Name	Brochure
Quantity	100
Size	A3 folded to A4
Ink	3 PMS colours
Binding	Saddle Stitched (stapled on spine)
Stock (paper)	white bond
Delivery	To 'XYZ' mailing house 1 ABC Street CITY

If you are relying on the designer to recommend a format for your project, you will not know the project specifications. However, you should give some thought to which items you require (ie brochure, annual general report, logo design, business cards) and how many copies of each item you require. Your knowledge of your audience size and characteristics will guide your decision-making here. For new brand names or other branding devices, you should also include the following statement in your brief:

“Department/Agency XXX requires that all branding concepts and devices presented to the Department have been checked first for possible infringement of an existing registered trade mark. (Refer to the Trade Marks Database at www.ipaustralia.gov.au or see professional advice.)”

Other illustrative material

If your project involves using illustrative material that already exists, eg charts, diagrams and photographs, you'll need to advise the graphic designer on the availability of these materials and how you anticipate their being used.

Should the brief be prescriptive or open?

A brief may be described as prescriptive or open, depending upon whether the consultant is required to propose a range of solutions, or simply to provide a costing against the list of tasks.

Prescriptive briefs will specify exactly what is required of the consultant. Open briefs will present the problem and leave the solution open for the creative input of the consultants. In most cases, you should leave the creative execution open to the consultant.

6. Special Considerations

Let the consultant know what constraints, if any, may apply to your communication activity.

Identifying constraints allows the consultant to give them special consideration when preparing the proposal.

These may include:

- subtleties of the communication task, eg 'musts' and 'must nots' in communicating the message, design etc;
- sensitive issues: for example, communicating with Aboriginal and Torres Strait Islander people or those from a non-English speaking background (you should refer to the *Guide on the use of non-Discriminatory Language and Images in Government Advertising and Information Material* which is available from GCU);
- identification of related State government requirements (logos and associated protocols etc) or other political considerations;
- the need to work with another consultant, such as a market research consultant or an advertising agency;
- regional or geographic constraints – products may need to be varied for metropolitan and regional areas;
- any specific financial constraints; and
- the necessity for materials to be approved by particular positions or by interest groups before release.

7. Types of Software/Hardware

With so many different systems being used these days, it is sometimes important to establish compatibility and you may wish to know what systems/programs the designer will be using. In some situations, you may want to stipulate the type of software/hardware you would prefer the graphic designer to use. However, to avoid unnecessarily constraining the designer, you should only do this if you are planning to use the material on your own equipment at a later date.

8. Budget

State the amount of money available for the graphic design project.

Be accurate about how much money is available to spend on the various aspects of the graphic design strategy and whether the figure quoted is subject to negotiation. Also, put in your preference for either a project fee or negotiated monthly accounts. Tell the consultant how much money is available now, for future development and the period of time that it will be available.

Regardless of whether you write a prescriptive or open brief, GCU recommends that you specify the budget. If you write an open brief it is particularly important that the budget is specified to enable proposals to be compared and to provide some parameters to help the consultants to structure their thinking.

9. Timeline

Include a time line outlining the timing and sequence of events.

A time line is essential to let your consultants know the period over which the communication strategy will take place. You also need to be realistic with the timetable, as unreasonably tight time frames will compromise the quality of the proposals you receive.

You should give your consultants at least two weeks, after the Q&A session (see Item 13), to produce their written proposals.

You should select only those activities that are relevant to your project. These could include the following:

Order	Action	Time required
1	Draft brief and seek legal/contractual advice	
2	Forward draft brief to GCU for comments	
3	GCU comments on brief and provides a list of consultants to approach	allow 2 weeks
4	The appropriate officer (or your Minister) approves the brief and list of consultants	allow 2 weeks
5	Brief sent to consultants	day after approval given
6	Q&A Sessions held	3 days later
7	Written proposals due	10 days later
8	All consultants present their proposals to assessment panel	3-5 days later
9	The appropriate officer or Minister approves panel recommendation	allow 10 days
10	Consultants informed of outcome	1-2 days after approval given
11	Contract signed	following day
12	Consultant starts work	after contract signed
13	Consultant finishes work	when contractual terms are met
14	Evaluation of consultancy undertaken	within a month of

		project end
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10. Consultants' Proposals

You need to tell consultants what you expect to be included in their written proposals.

For example:

- a list of the items to be produced;
- the number of roughs/mock ups of creative concepts to be provided, if applicable and instructions for the graphic designer to check the creative concepts first for possible infringement of an existing registered trade mark (Refer then to the Trade Marks database at www.ipaustralia.gov.au or seek professional advice);
- a detailed costing (daily/weekly/hourly rates) for producing roughs, finished art, attending liaison meetings or providing any other services;
- a timetable for producing the product;
- details of staff who will be working on the project, clearly identifying their roles;
- details of similar projects the consultant has worked on including examples, references and contact numbers; and
- details of reporting and invoicing formats and procedures.

11. In House Resources

List all facilities and/or staff (if any) the consultant can use.

Be as accurate as you can here, as your consultants will then develop their proposals on the basis of these resources being available. You can also be contractually obligated to make these resources available during the period of the consultancy.

In house resources might include a bank of suitable photographs or illustrations, existing equipment for exhibitions, audio-visual equipment, access to computer equipment, and trained staff.

12. Selection Criteria

Establish the criteria on which you are going to evaluate the consultants' proposals.

The following provides examples of selection criteria covering most requirements:

[Note: You should select only the most relevant criteria for your project.]

- understanding of the brief;
- empathy with the project;
- the suitability of proposed creative materials (if applicable);
- demonstrated ability to deliver a quality product on time and within budget;
- quality of the team of people who will work on your business;

- cost effectiveness;
- ability to work cooperatively with the department;
- no conflict of interest; and
- references from previous project (please provide details).

13. Consultant Q&A Sessions

Q&A sessions are held once the brief has been distributed to tendering consultants.

Setting up meetings for these Q&A sessions is a very important and valuable exercise and will save you time and effort in the long-term. Everyone benefits – you can discuss and expand on information contained in the brief and the consultants can clarify issues that may be of concern to them.

State when, where and with whom the consultant Q&A sessions will be held.

Key people involved in assessing the proposals should be present at all of the Q&A sessions.

It is standard practice for the client department to pay for a return economy airfare for non-Canberra based consultants.

14. The Pitch

There are two common ways to approach the pitching process – creative pitch and credentials presentation. In both cases you will have to prepare a very thorough brief.

Creative pitch

In a creative pitch, you ask the prospective designers to prepare some ideas specifically for your organisation or project. Specify exactly what you expect the consultants to produce and to what standard (camera-ready art, rough sketches, mock-ups etc).

GCU strongly recommends paying pitching fees if you request mock-ups from the consultants. It is standard practice in the graphic design industry for pitching fees to be paid for creative pitches and GCU always advises its Australian Government clients to uphold this practice. Pitching fees do not cover the materials and time put into a mock-up but they are paid as a professional courtesy. If you decide not to offer pitching fees you run the risk of having most of the consultants withdraw from the process. Contact GCU for advice on how much to pay as it varies depending on the size of the project. You must also allow the consultants adequate time to prepare ideas.

Ownership of the physical expression of the concepts and the materials is determined by the brief and pitching fee agreement. All intellectual property remains with the originator unless otherwise agreed. It is unethical to take an idea from one consultant and incorporate it into the successful consultant's proposal. The purchase of the idea should be negotiated with the consultant.

You should also ensure that the consultant has checked the proposed creative concept first for possible infringement of an existing registered trade mark. (Refer to the Trade Marks database at www.ipaustralia.gov.au or seek professional advice.)

An alternative to paying pitching fees, is to select a consultant based on a credentials presentation and the proposal.

Credentials presentation

In a credentials presentation, you ask the designers to show you examples of their past work which may match your requirements. The two major advantages with this option are (1) you don't have to pay a pitching fee, and (2) you don't have to wait until the consultant produces the concept before making your selection. It is also often the preferred position of many graphic designers and, if you insist on a creative pitch, you may find some of the designers you invite to tender will not accept the brief on this basis.

15. Terms of Business

Invoice payment

The Australian Government requires that invoices be paid within 30 days following the receipt of a correctly rendered invoice.

Reporting requirements

Be sure to provide details of when and how you expect consultants to report on their progress and how often you would like to formally meet with the consultant. They will need to consider this when estimating costs for proposals, particularly where travel is involved.

Conflict of interest

Some consultants may have current or past clients whose interests are not compatible with your communication activities. An example is a consultant who has a tobacco company as a client and who may not be considered suitable for 'Drug Offensive' work.

You should seek from consultants details of any situation where this may occur. An ethical consultant will disclose details of conflicts of interest, either perceived or actual. In some cases, a perceived conflict of interest may be so trivial that it will not affect the assessment of proposals.

However, there will be some circumstances where the conflict of interest can be perceived as having a significant influence on the quality and objectivity of the consultant's work. In these cases, the consultant's proposal should not be considered.

Whether causes of conflict of interest are identified or not, GCU recommends that departments include the following paragraph in their briefs to consultants:

“The consultant will be engaged using a standard Australian Government contract which requires the consultant to declare any risk of conflict of interest. Where the department establishes, from information provided by the consultant or other information available to it, that a conflict of interest exists, such a conflict may be grounds for exclusion of the consultant from consideration for this consultancy after an opportunity is given to discuss the matter with the consultant. In the event the department establishes a conflict of interest exists after the engagement of the consultancy, the contract between the department

and the consultancy may be terminated by letter in accordance with the terms and conditions of the contract”.

Termination and/or variation of project

To protect yourself in case the project does not go ahead after the brief has been sent to consultants, you should include the following paragraph:

“The Australian Government may, in its sole discretion, at any time, vary or deviate from the processes outlined in this brief, or terminate the briefing process or any negotiations being conducted at that time with any person. The Australian Government reserves the right in its sole discretion to suspend, terminate or abandon this project any time prior to the execution of a formal contract by the Australian Government. The Australian Government reserves the right to refuse to consider and/or accept the lowest or any proposal without reference back to any consultant provided that the Australian Government shall give written notice of such decision to each of the consultants.”

Contract

One of the most common delays, once the consultant has been hired, is that the contract isn't ready. The consultant must not begin work until the contract has been signed.

GCU recommends that you seek advice from your departmental legal area before you finalise the brief. You may find that your department has specific requirements that have to be included in the brief.

You should attach to the brief a copy of the conditions under which the consultant will be required to work – a blank draft contract. You may wish to use the standard consultancy contract which is available from GCU.

The Standard Consultancy Contract has been developed by the Australian Government's legal advisers to be as comprehensive as possible, and to provide the greatest possible security for Australian Government officers. These include considerations about intellectual property, privacy of information, and consultants' access to the media. Consultants may wish to vary these terms and conditions. You should always seek professional legal advice if you wish to vary the Standard Consultancy Contract.

Other considerations

You will need to consider what is required by your departmental purchasing instructions when buying consultancy services.

16. Contacts

Provide the contact details of the departmental representatives.

You should let consultants know who they will be working with and where to access information, include the names, addresses, phone and fax numbers of:

- the departmental project manager;
- people who are able to help the consultant with queries on the brief;
- a departmental officer, preferably someone with sound background policy/project knowledge who can attend the Q&A sessions and the presentations; and

- the GCU project manager.

Need more help?

1. If you need additional help, GCU can provide advice on writing your brief and managing consultants.
2. To help you engage consultancy services you can find out more from your own departmental purchasing instructions.
3. If you would like further help with your brief, contact:

Director, Communications and Research
GCU
3-5 National Circuit
Barton ACT 2600

Tel: (02) 6271 5829
Fax: (02) 6271 5850

Attachment A**The Elements of a Corporate ID****What is a Corporate Identity (CID)?**

Like your own identity, corporate identity represents your organisation's appearance in the world, mostly outside, but CID also affects internal communication.

Designing a corporate identity can include:

- the company name, its logo or tag line;
- developing a standard typeface for signage and or written communication;
- the appearance of documents such as company publications, letters, minutes, envelopes, advertisements;
- vehicles;
- signs;
- office environments (particularly public areas); and
- employees' appearance and manner of interacting with the public, including uniforms and standard interactions ("have a nice day", "would you like any fries with that order").

Redesign Starts with the Company Name

Is it still up-to-date? Colonial Sugar Refineries re-named itself CSR. The Bank of New South Wales re-named itself Westpac. A partnership may need to change its name when a partner leaves – or like many established legal firms, retain the names of eminent early partners.

Names and logos are central to the public recognition and image of any organisation. The name is often associated with a key visual image – McDonald's with the yellow arches, Westpac with the Red W, the Commonwealth Bank with the yellow and black diamond (the changeover from the elephant to the diamond caused considerable public interest).

Before you start

Changing a corporate identity is expensive and time-consuming. Before you change anything, talk to your clients, customers, stakeholders, staff and others, to determine how the organisation is currently seen, and what would need to be changed before their perceptions would change. It's no use investing in a fancy modern image if your entire internal system is straight out of the British Raj – corporate letterhead and so on is just the icing on the cake.

Consultation

You should also bear in mind that, no matter how careful you are, or how talented your designer, not everybody will agree on the new design, and some people will hate the finished product. Where changing the logo is a difficult decision, researching the result – or several alternatives – with your key stakeholders, will encourage commitment to the new design, and assist you to justify the final choice.

Once you have a design that pleases your key stakeholders (who may include your governing Board, the Minister, your boss, your most important clients, the clients you wish were your most important clients) it is important that the design is used consistently.

The Style Manual

Most organisations have a 'Style Manual' which instructs the various people who will use the design on exactly how to do so consistently. Typeface, colour, page positioning, and relative size will all be important considerations. You may need to consider what will happen to your colours when they are reproduced in a black and white document. You may also wish to specify which types of documents will carry the logo and which will not.

Signage

This is a complex subject. Make sure your designer has some experience in exterior and interior signs if you need to change them when you change your corporate image. Interior signs should be discussed with your interior designer if you employ one. You will need to consider scale, placement, materials, local regulations about signs, power requirements for lit signs, building owners' requirements, whether signs will be read from a moving vehicle or by a stationary pedestrian.

Considerations when planning an exhibition or display

Many organisations find that exhibitions and displays are an effective means of promoting organisations or ideas to a wider public. Examples include the Department of Defence's recruitment displays at National Agricultural Shows, and the Department of Health and Family Services multicultural outreach exhibitions.

Key considerations for planning an exhibition as opposed to other types of communication include construction issues, such as the costs of labour involved in constructing, storing, dismantling and transporting exhibition elements. You will also need to consider the cost of electricity, flooring and landscaping the exhibition if necessary.

Travelling exhibitions

A travelling exhibition may need to be flexible enough to fit into large sites or small, depending on the availability and cost of space. Exhibition sites are generally rented, and the cost of rental and other charges should be factored into your budget.

Staff may need to be made available from local offices to look after the exhibition. In these circumstances, some training may need to be provided. Alternatively, specialist staff could be attached to the exhibition as it travels.

Other considerations include the location of the exhibition, its relationship to other exhibits and the layout of the conference or display as a whole.

Timing could be a consideration. For example, with the expected increase in demand for accommodation and display sites due to the Olympic Games in Sydney in 2000, some increase in costs and reduction in availability is to be expected.

Because there is a large capital cost associated with constructing a major exhibition, it would usually be expected to last for some time. The design of an exhibition of this type should be such that it will not look dated within its planned life span. The materials used in such a long-term display should be chosen for their durability as well as aesthetic considerations.