



University
of Victoria

Purchasing
Services

REQUEST FOR PROPOSAL

MARKETING PREFERRED SUPPLIERS

Reference # RFP 394

CLOSING DATE AND TIME:

By 2:00 p.m. Pacific Time on March 19, 2009

CLOSING LOCATION:

STREET ADDRESS:

Purchasing Services Department
Room 110 Saunders Annex
3800 Finnerty Road
Victoria, BC, V8P 5C2

MAILING ADDRESS:

P.O. Box 1700, STN CSC
Victoria, BC, V8W 3R4

Phone Number: (250) 721-8326

Fax Number: (250) 721-8327

Email: purchase@uvic.ca

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SECTION 1.0 INTRODUCTION AND SCOPE OF WORK/PROJECT

1.1 Background and Nature of the Project

The intent of this RFP is to identify one or more service agencies to act as Preferred Suppliers (AOR), on a non-exclusive basis, for the **University of Victoria** to include account service, creative, design, production, media, web services, broker of research services, both qualitative and quantitative, that meet the needs of UVic in a strategic, efficient and cost-effective manner. These suppliers must be able to work with University marketing personnel, employing state of the art brand look and tonality on pre-existing and new projects. They must have a strong sense of place regarding Victoria, the University's role in it, and its various constituent groups. Subject to an annual performance review, the successful Proponent will commence a working relationship with UVic, reporting to the Director of Marketing, for a term of 3 years with an option to renew for up to two 1-year terms at the discretion of the Vice President, External Relations and upon approval of the Director, Purchasing Services. It is anticipated that the contract will commence on June 1, 2009.

During the term of an agreement awarded through this RFP The University reserves the right to retain at its sole discretion an alternate supplier(s) to perform and carry out work that the University deems can be better performed by, and is most suited to, the alternate supplier. The University may solicit alternative quotations during the term of an agreement resulting from this RFP to ensure it is attaining best value at all times during the term of the agreement.

UVic welcomes submissions from all full service, Canadian-owned agencies with a local office, a dedicated senior account person and a creative team that meet the qualifications and requirements as illustrated in Appendix A.

1.2 Purpose and Objectives of the RFP

The University of Victoria (UVic) has identified as a strategic priority the need to identify firms, agencies or individual consultants that can provide the University with an innovative but cost-effective advertising service. The objectives of the RFP are to:

- ❑ Clarify the scope of work including business and technical requirements;
- ❑ Provide instructions to Proponents on this competitive proposal process;
- ❑ Obtain proposals specifying the services, products and facilities to be provided by the Proponent and the associated pricing structure;
- ❑ Select a successful Proponent based on UVic evaluation process and criteria;
- ❑ State the terms and conditions for subsequent contractual agreement with the selected Proponent; and
- ❑ Enter into a contract negotiation with the selected Proponent.

The eventual contract(s) awarded to the selected Proponent(s) are contingent upon approval by the Vice President, External Relations.

1.3 Scope of Work and Requirements Definitions

This section outlines the general requirements and specifications in the context of an overall business solution. This conceptual model provides the common infrastructure framework for the overall Program.

1.3.1 Scope of Work

The University of Victoria (UVic) proposes to contract the services of a full service marketing agency to provide a complete range of professional services associated with the development and implementation of ongoing marketing plans for the University. In order to execute ongoing marketing work, the firms should have established strengths in at least one or more of the following: online marketing, general brand development, media placements, case developments and/or market research. The Proponent must demonstrate knowledge of the current Canadian and global university environment. The successful candidate(s) will be required to work closely with the Marketing Department in contributing to and achieving the short and long term goals as developed in conjunction with the UVic's stakeholders which include but are not limited to student and staff recruitment, alumni, and community engagement. The successful candidates will also work closely with the Marketing department in the execution of strategies. See Appendix A.

The University of Victoria reserves the right to use the Proponent's resources as required to fulfill the occasional marketing and advertising requirements of the University as a whole.

1.3.2 Specifications

The proposed solutions and provision of services must include the functionality to allow UVic decision makers to select a Proponent and award a long-term Agreement with a reliable advertising service provider.

Ad-hoc and regularly scheduled management information reports/data must be made available for UVic to make informed decisions at the operational and strategic levels. As part of the overall framework, your solutions must include an effective Supplier relationship management component.

Proponents are to provide descriptive information sheets for all products and services as specified with their proposal.

1.3.3 Deliverables

Within the scope of work and requirements defined in this RFP and with the assumption that an agreement will be executed in early April 2009, the successful Proponent(s) will be required to deliver the products and services identified in Appendix A.

SECTION 2.0 INSTRUCTIONS TO PROPONENTS

This section defines the proposal preparation and submission procedures that are to be followed by all Proponents. Proponents are cautioned to carefully read and follow the procedures required by this Request for Proposal as any deviation from these requirements may be cause for disqualification.

This is a Request for Proposal (RFP) to be developed setting out the alternative means by which several technical, service, performance, time, and other goals and objectives may be best met according to stated mandatory requirements.

2.1 Definitions and Acronyms

The following definitions apply:

- **“Agreement”** means the written agreement (contract) executed by UVic and the Proponent;
- **“Consultant”** means an individual, firm or group that submits, or intends to submit, a proposal in response to this RFP;
- **“Contract”** means a written Agreement executed by UVic and the Contractor;
- **“Contractor”** means an individual, firm, consultant, supplier or group that is awarded an Agreement with UVic and is not deemed to be an “employee” as defined by Canada Revenue Agency (CRA);
- **“Independent Consultant”** means an independent firm, individual, or organization that is awarded a contract and enters into an Agreement with UVic under this RFP and is not deemed to be an “employee” as defined by Canada Revenue Agency;
- **“List of Qualified Suppliers”** means a list of names of individuals, firms, consultants or groups possessing the qualifications required under each respective RFP that have satisfied any conditions set by UVic for being added to and staying on that list;
- **“Must” or “mandatory”** means a requirement that must be met in order for a Response to receive consideration;
- **“Premise”** means a specified UVic location;
- **“Proponent”** means an individual, firm, consultant, supplier, or group that submits, or intends to submit, a proposal in Response to a Solicitation Invitation;
- **“Qualified Supplier”** means a Proponent possessing the qualifications described in this RFP that has satisfied all conditions set by UVic for being added to, and staying on, the List of Qualified Suppliers;
- **“Respondent”** means an individual or a company that submits, or intends to submit, their qualifications in response to this “Request for Proposal”;
- **“Response”** means a statement of qualifications submitted in reply to a Request for Proposal;
- **“Response Submission”** means a formal response by a Bidder or Proponent to a Solicitation Invitation in the form of a bid, tender, quotation or proposal. “Services” means labor, resources and materials provided by the Supplier as required to perform the Agreement as executed;
- **“Services”** means labour, resources and materials provided by the Supplier or Service Provider as required to perform the Agreement as executed;
- **“Service Provider”** means a Contractor or Supplier;

- **“Should” or “desirable”** means a requirement having a significant degree of importance to the objectives of the Request for Proposal but is not mandatory;
- **“Solicitation”** means an invitation by UVic to Bidders or Proponents to submit formal quotations, bids, tenders, proposals or statements of qualifications in direct Response to the invitation;
- **“Supplier”** means an individual, firm, consultant, contractor, or group awarded an Agreement under a UVic Solicitation Invitation and includes Independent Contractors and Service Providers; and,
- **“University” and “UVic”** means the University of Victoria and include the related entities who are seeking the services described in this Request For Proposal and include UVic’s employees and Independent Consultants and Contractors retained by UVic for this Project.
- **“Independent Contractor”** means a firm, individual, or organization who is awarded and Agreement with UVic and is not deemed to be an “employee” as defined by Revenue Canada.

2.2 Calendar of Events

■ RFP Issued	January 30, 2009
■ Respondents' Meeting (If required)	February 26, 2009
■ Cut-off Date for Submitting Questions (12:00:00 p.m.)	March 4, 2009
■ Answers to Questions Issued to Proponents	March 10, 2009
■ Proposals Due and Opened (2:00:00 pm.)	March 19, 2009
■ Evaluation of Response Submissions	March 25, 2009
■ Establish Short-List for Presentations	March 27, 2009
■ Formal Presentations	April 2/3, 2009
■ Selection of Proponent	April 7, 2009
■ Commencement of Contract	June 1, 2009

2.3 Closing Date and Time

THE CLOSING DATE AND TIME FOR THIS RFP IS:

March 19, 2009 at 2:00 pm Pacific Time (As per UVic TENDER TIME CLOCK)

Proponents have the sole responsibility to ensure proposals are delivered, received, and time/date stamped at:

INFORMATION DESK – MAIN ENTRANCE
 Room 110, Saunders Annex
 University of Victoria
 3800 Finnerty Road
 Victoria, British Columbia, V8P 5C2

Fax Proposals: Will not be accepted.
E-mail Responses: Will not be accepted.

2.4 Information and Inquiries

Any question related to the proposal must be directed to the Purchasing Officer whose name appears below. The Proponent shall **not** contact or ask questions of the UVic department for which the contract is being administered, unless so directed elsewhere in this document.

PROPOSAL INQUIRIES:

Ken Babich, B.Com, CPPO

Director, Purchasing Services Department

Phone: (250) 721- 8330; Fax: (250) 721-8327

Email: kbabich@uvic.ca

TECHNICAL AND OPERATION INQUIRIES:

Justin Kohlman

Director of Marketing

UVic Marketing

Phone: (250) 721-8951; Fax: (250) 721-8955

E-mail: jkohlman@uvic.ca

The Proponent shall submit in writing any questions regarding the specifications, discrepancies, omissions or any apparent ambiguities to the attention of UVic prior to March 4, 2009.

The clarification will be reviewed, and where information sought is not already clearly indicated, UVic will issue an addendum to all Proponents that will form part of the Agreement document.

Addenda are the only means of verifying, clarifying, or changing any of the information contained in this Request for Proposal. Other than a member of the Purchasing Services Department, no employee or agent of UVic is authorized to change the content of this proposal and/or any addenda. Receipt of all addenda must be acknowledged in the form provided on the Proposal Form (Appendix D).

Questions must be faxed to the attention of the Purchasing Officer indicated in the previous section. After each FAX is sent, Proponents shall call (250) 721-8326 and state that an inquiry has been sent and the number of pages, and leave their name, company name, and phone number. UVic will not respond to questions posed via the voicemail system. RFP Terms and Conditions may only be modified by written addendum issued by UVic.

2.4.1 Communications Guidelines

From the release of the RFP until a contractor or service provider is selected and an Agreement executed, Proponents shall not communicate with any UVic staff concerning the RFP, except as set forth in the methods described herein.

UVic reserves the right to contact Proponents after receipt of proposals for clarification of any items within their proposal.

2.4.2 Changes and Extensions

UVic may amend specific sections of this RFP at any time during the proposal process. Should UVic issue an addendum to this RFP, the submission deadline may be extended for all prospective Proponents, if appropriate, to accommodate changes in proposal content.

2.4.3 Notification of Award

Proponents are invited to call UVic at (250) 721-8326 to obtain the status of this Request For Proposal.

UVic Purchasing Services Department will notify the successful Proponent(s) and issue an UVic Purchase Order or formal Agreement.

2.5 Oral Presentations

Following the evaluations of the Proposals, the University requests that short-listed Proponents prepare a presentation to University staff. Any such presentation would demonstrate the Proponent's experience, demonstrations of success, strategic capabilities and, to a lesser degree, creative capabilities. It is a requirement of any such presentation that all costs be borne by the Proponent for all "costs" of its creative materials.

2.6 Receipt and Confirmation Form

Proponents are required to complete and return the attached Confirmation Form (Appendix "E"). All subsequent information regarding this Request for Proposal, including changes made to this document, will be directed only to those Proponents who return the form. Subsequent information will be distributed by the method noted on the Confirmation Form.

2.7 Withdrawal Conditions

The Proponent may withdraw their proposal at any time prior to the proposal closing time by submitting a written withdrawal letter. Submit the letter to the Director, Purchasing Services, Purchasing Services Department and the proposal will be returned unopened.

2.8 Copies of Proposal Documents

An original and three (3) copies of the Proposal documents must be submitted by the Proponent to the Director, Purchasing Services Department.

2.9 Opening of Proposals

Proposal opening shall be held after the date and time indicated in the proposal documents. All proposal openings are non-public.

Note: For the following Terms and Conditions, refer to the URL noted below:

URL: <http://web.uvic.ca/purc/docs/sourcing/RFPTERMS.pdf>

SECTION 3.0	MANDATORY PROVISIONS AND REQUIREMENTS
SECTION 4.0	PROPOSAL FORMAT
SECTION 5.0	EVALUATION OF PROPOSALS AND AWARD
SECTION 6.0	TERMS AND CONDITIONS
SECTION 7.0	REGULATORY, LICENSING, AND RISK MANAGEMENT PROVISIONS
SECTION 8.0	CONTRACT ADMINISTRATION PROVISIONS
SECTION 9.0	INFRASTRUCTURE RELATED TERMS AND CONDITIONS
SECTION 10.0	STEWARDSHIP PROVISIONS

APPENDIX A – SCOPE OF SERVICES

1.0 Requirements

The University of Victoria (UVic) proposes to contract the services of at least one full service marketing agencies to provide a range of professional services associated with the development and implementation of ongoing marketing plans for the University. This marketing plan must be consistent with UVic's vision and brand strategy. The selected firm(s) will be required to work closely with the Marketing Department in contributing to and achieving the short and long term goals as developed in conjunction with the UVic's stakeholders.

The University of Victoria reserves the right to use the Proponent's resources as required to fulfill the occasional marketing and advertising requirements of the University as a whole.

During the term of an agreement awarded through this RFP, The University reserves the right to retain, at its sole discretion, an alternate supplier(s) to perform and carry out work that the University deems can be better performed by, and is most suited to, the alternate supplier. The University may solicit alternative quotations during the term of an agreement resulting from this RFP to ensure it is attaining best value at all times during the term of the agreement.

2.0 Term

The term of the contract is for a period of three (3) years commencing June 1, 2009, with an option to renew for up to two 1-year terms at the discretion of the Vice President, External Relations and upon approval of the Director, Purchasing Services.

3.0 Marketing Department Responsibilities

The Marketing Department regularly contracts out for additional marketing services, such as research, which may be made available to the selected firms for purposes of strategic analysis and planning for the Marketing Department's programs.

4.0 Scope of Work

The following represents scope of work:

Strategic Planning & Account Management

- demonstrated knowledge of the higher-education category and its competitive context, with emphasis on recruitment and development (fundraising);
- a sound understanding of the University's objectives and challenges;
- a sound understanding of the University's brand positioning and brand messaging to date;
- local/regional representation;
- provision of a solely-dedicated, senior account director (or similar position) as principal contact to the University;
- general marketing and strategic counsel;
- development/consequent testing of marketing plans, objectives, strategies;
- target market analysis; target group(s) profiling and insights
- competitive information/analysis;

- available resources necessary for the production of collateral print, broadcast, internet and direct mail projects;
- ability to develop innovative promotional concepts/tangibles;
- have the resources to plan and execute local, regional, national and international media including a demonstrated knowledge of new trends and ability to execute and recommend online media;
- checking and implementing media billing, affidavits and media proof of performance (where applicable); post-buy analyses where required;
- proactive “bringing forward” of new media opportunities as they arise;
- have the resources to provide a variety of both quantitative and qualitative marketing and concept/creative research methodologies;
- provide, or have a contractual partner which may provide, public relations services if required; and,
- financial accreditation/qualifications to place large volumes of advertising on credit.

Production & Traffic - obtain copy approvals:

- supervising all projects from briefing to completion; clear communications with University Client throughout;
- estimating and docket control;
- purchasing, supervising photo, art, mechanical art;
- press checks where needed;
- ability to handle all aspects of broadcast production: casting, negotiation of talent contracts, talent payment/residuals, station distribution;
- verification of invoices to contracts;
- obtain legal clearances where necessary;
- paying media and other outside suppliers, invoicing Client; and,
- providing annual audit, if requested by Client.

Other :

- event marketing, support of University sponsorships;
- trade show display materials;
- integration of e-marketing, working closely with University’s Web Coordinator;
- be staffed at all levels to sufficiently maintain timely and quality services on a high volume account; and,
- Other-language capabilities if required.

5.0 Reporting Requirements and Procedures

The selected firm(s) will be expected to follow all general reporting and contact procedures with the Marketing Department. This would include, but not be limited to, general planning meetings, presence at University committee planning meetings, follow-up contact reports from client meetings as required; supplying of project weekly status reports; daily point contact on a project-by-project basis as required; budget and estimate reports by project as required; bi-annual agency reviews to be scheduled.

6.0 Project Management

The Marketing Department requires the selected firm(s) to supply a ‘team’ of staff who will be exclusively dedicated to the University’s account and business. This team should be

comprised of senior staff, a client account director, account executive(s), creative/art/production staff, media research/planning/buying staff, and the capabilities of public relations staff, or other-language staff, at their disposal and as required.

The client account director should have strategic capability demonstrated by market insights and product knowledge. This person must be able to manage a large, dynamic account with a sophisticated client, political profile and demanding partners; have an intuitive understanding of the creative process, creative people and the target audience; and have the ability to manage people and lead a service team.

The Marketing Department's marketing and creative services staff will, at various levels, be directly involved with the account.

APPENDIX B – EVALUATION OF PROPOSALS

1.0 Evaluation criteria

The following criteria form the basis upon which evaluation of proposals will be made.

1.1 Mandatory Criteria

The following are mandatory requirements. Please address your responses to the following on a separate page. Proposals not meeting these mandatory requirements, or not clearly demonstrating that they meet them in a substantially unaltered form, may receive no further consideration during the evaluation process.

Conflict of Interest Guidelines:

The proposal must include disclosure and discussion of the Proponent's relationship with other higher education sector clients. Any Proponent having a question regarding conflict of interest should submit the question and details in writing to the attention of: Ken S. Babich, BCom, CPPO, Director, Purchasing Services at kbabich@uvic.ca

Agency Accreditation:

The Proponent is required to have at minimum an "AA" rating with the Canadian Daily Newspaper Association and must submit an outline of the details of current accreditation and membership, as well as provide copies of the appropriate documentation.

References:

The Proponent must supply at minimum three (3) client references, ideally in the higher education sector that could be contacted about their working relationship with your agency. (Please note: The Marketing Department reserves the right to use prior knowledge and experience as a client reference in the evaluation of a Proponent's proposal.)

Completion of All Questions:

All sectional questions MUST be answered in the order provided. Failure to do so may receive no further consideration during the evaluation process.

1.2 Desirable Criteria

The following criteria will be evaluated for all proposals that satisfy the mandatory criteria. Items marked with an asterisk are critical, and a minimum score of 65 PERCENT on each of these factors must be achieved in order for a Proposal to be considered compliant. Please insert references to the appropriate pages or sections of your Proposal that deal with the subjects under evaluation.

Factor	Weight	Reference Proposal Page/Section
Capacity Does the agency have a scale that is sufficient to handle this account? Is there demonstrated flexibility with assignment of staff project by project?	5%	
Geography/Office Location Does the agency demonstrate the experience necessary to deliver on our requirement for market coverage relative to local, regional, national and international markets?	5%	
*Capability & Expertise Does the agency have the services and skills to fulfill this contract?	25%	
*Creativity & Business Building Has the agency demonstrated a track record, with particular emphasis in recruitment, advancement and overall marketing, with an outlook to achieving results and are they relevant? Does the agency have a good grasp of current technologies and trends to advise for meeting key audiences?	25%	
*Strategy Is there evidence of strategic thinking, customer insights and a track record in persuasion and motivation? Have they proven they proactively suggest ideas to meet client goals?	30%	
Financial Has the agency demonstrated flexibility with remuneration options available? Is there a willingness to use the remuneration system best suited to a client's needs? Have all fees been supplied and broken out as requested? Is there a fair and equitable process for disputes?	5%	
Presentation Was the material well presented in the proposal? Did the agency respond by using the numbered questionnaire as provided? Was it interesting and stimulating?	5%	

2.0 Submissions Evaluation

Each of the following categories and questions will be scored according to the section and point rating noted in Desirable Criteria. Some categories are noted as 'Mandatory' and may result in no further consideration of a proponent's submission. **Please respond to each question in the order it has been provided.**

3.0 Agency Background Details

1. Provide the total number of employees, head office location and any branch offices within your company.
2. Provide an ownership description by supplying the parent company name/location, as well as names/titles of major shareholders and partners.
3. Please supply proof of financial stability.

4.0 Agency Capacity

1. What are your estimated agency billings for this year?
2. What are your billings for the previous two years (please list as separate yearly amounts)?
3. What impact will the size and volume of work generated by this account have on your other clients?
4. Describe the process you use to accommodate the demand (ebb and flow) of staff resources relative to work available.

5.0 Geography/Office Location

1. If the Agency has no head office or branch location within the Victoria area, is there a willingness to set one up in order to service this account?
2. If the answer to Q1 is 'Yes', describe who would staff this location and how would the costs be absorbed by the Agency.
3. If the answer to Q1 is 'No', describe how you would manage the UVic account from a distance and how would the costs be absorbed by the Agency.

6.0 In-Market Experience

1. Provide the percentage breakdown of billings by media within Canada, and for the US, Europe and other countries if applicable.
2. Indicate the resources and contacts you can utilize in British Columbia's core target markets. These resources should relate to creative development, strategic market and advertising planning, market research, media research/planning/buying, new media, direct and data base marketing, events and promotion, public relations, A/V broadcast production, and co-operative advertising opportunities.

7.0 Capability & Expertise

1. Describe the team structure, reporting structure and the role each team member will play in the servicing of this account. Please address employee qualifications and relevant higher education and marketing experience.
2. Identify those senior people in your employ, by department, and to what extent/circumstances they are in direct contact with your clients.
3. Identify the strengths and capabilities of your account management, creative and

media sections in the following areas:

- account management;
 - strategic market planning;
 - creative design (art and copywriting);
 - media (research, planning and buying);
 - broadcast production;
 - research capabilities;
 - administration functions (invoicing and back up);
 - event marketing/promotions;
 - fundraising knowledge/experience;
 - direct/data base marketing/e-marketing;
 - public relations; and,
 - new media (internet/web design/E-marketing).
4. Describe your approach to the development of a successful marketing program in any category where traffic-generation/selection within a consideration set was requisite.
 5. Please summarize any other agency information that is relevant (e.g., special resources available in direct marketing, research, special strengths).
 6. Describe any training programs in place for long term employees of your agency.
 7. List any value added benefits you have successfully negotiated on behalf of your clients.

8.0 Creativity & Business Building

1. List the clients/brands gained over the past 24 months and state reason(s) why.
2. List clients/brands lost over the past 24 months and state reason(s) why.
3. Please comment on those accounts on which you feel you have made a significant contribution to the client's success, and you measured this success.
4. What are the procedures your agency follows to evaluate the quality and effectiveness of work, specifically with regard to the development of advertising strategies and creative product?

9.0 Strategy

1. Describe how you would work with us to develop and implement marketing plans to increase our brand awareness, student recruitment and advancement objectives. In describing this process, please discuss key points such as identification of highest-yield market opportunities, development of the strategy, marketing plan, advertising plan; market research; creative development and production processes; media research, planning and buying processes; language requirements; direct and data base marketing processes.
2. In your view, what are the top three unique selling propositions the University has to offer in each of the following markets: Vancouver Island; British Columbia, and Canada?
3. What kind of partnerships do you feel could provide added exposure for Victoria as a higher education destination? Briefly explain why. (These partners could be traditional and/or non-traditional in nature.)

10.0 Financial Details

Financial

1. Which type of remuneration arrangements will you consider? Commission? Fee? Performance based remuneration? Please explain why.
2. Do you have a formal cost accounting system by which you know the margin and contribution to earnings on each account?
3. Do you review account earnings and losses with your clients?

11.0 Project Fees

Proponents are asked to detail all fees, expenses and incidental charges for which they expect to be reimbursed. Please address the specific questions noted below.

1. What are your professional service and personnel costs by hourly rates?
2. Please supply an estimate of monthly personnel costs based on the proposed account team selected.
3. What is the percentage commission charged on creative, production, research and any associated disbursements?
4. Do you bill on a 'fee-for-service', retainer or other system?
5. What are your standard creative and production and technical costs for scanning, text entry, imaging, computer graphics or other mechanical requirements?
6. Do you bill miscellaneous costs (couriers, meals, travel, taxis, etc) at net or with a percentage commission?
7. Provide a one (1) year budget estimate for all account costs and indicate the proposed breakdown of costs to be spent on personnel, production, media placement, administration and miscellaneous charges.
8. Describe your process for settlement of financial disputes. Please include process, time lines, actions and any other relevant information.
9. What is your company's position on a 'Payment by Results' performance billing system?
10. The University has a policy of paying by invoice after a service has been rendered. Outline your procedures related to the administration of this account. This should include production and media estimating, a billing schedule, preparation of status and contact reports, the scheduling of regular meetings to discuss account progress, program evaluations, monthly budget reports and other relevant data.

12.0 Short List Presentation

The second part of the evaluation will be comprised of a presentation workshop. This workshop will take a total of 2 hours from start to finish. This includes: 15 minutes for Agency set up, 60 minutes for the presentation, 30 minutes for Q&A and 15 minutes for tear down. The details of the requirement for this presentation will be made available to the Short Listed group of submissions at a later date. The top four submission scores combined with a minimum submission score of 75% will determine those proponents who make the Short List. The scores attained by each short listed agency will be added to the submissions score for a total score.

13.0 Presentation Evaluation Criteria

The Short Listed agencies will each be provided with the same issue for response. The criteria used to evaluate the presentation are as follows:

Factor	Weight
Capabilities Does the proposed agency team have the necessary qualifications? Do they work well together?	20%
Comprehension Does the agency understand the requirements of this assignment?	20%
Service Is there clear evidence of a service mentality? Does the agency welcome client involvement and a preparedness to challenge effectiveness and efficiency?	20%
Strategic & Tactical Thinking Is there evidence of innovation and ingenuity in the agency's solutions? Is there measurement of success in terms of return? Is proposed solution practical? Can it be done within budget and time lines?	30%
Overall Impression Have the agency and their people been impressive throughout the process?	10%

14.0 Agency Visits

As a final evaluation component, the Marketing Department may exercise its option to conduct Agency Visits. The intention of the agency visit is to confirm agency skills, resources and capabilities, as well as have a second meeting with the proposed team who would be assigned to the business of the tourism account.

15.0 Agency Visit Scoring

The score assignment for the agency visit will be comprised of two key parts - capabilities and the relationship.

Capabilities - 50%

Can the agency do the job? Examination of the functional capabilities of the agency in terms of our needs and priorities. Review of the following key points: creative approach, strategy and branding skills, people management, team approach, service delivery, track record of results for clients.

Relationship - 50%

Can our relationship work? This examines the key relationship issues. Consider the following: 'fit' relative to our business, are we similar in attitude, is there a similar work ethic/interest, is there a positive people culture in the agency?

APPENDIX C - PROPOSAL RESPONSE REQUIREMENTS AND PROPOSAL FORMAT

Proponents are requested to supply the following information. Please provide pricing as indicated below in Financial and Costing.

- An agency profile.
- Description of specialized services.
- Recommendations for UVic/agency reporting and financial arrangements.
- A summary of your agency's strategic, creative marketing and media approach to the University's advertising needs.
- Proponents should include a portfolio containing a representative cross section of advertising work of which they are most proud. (The portfolio will be returned). A brief description of why your agency is best suited to handle the University's business.

Financial and Costing

The proponent's full response to this RFP must be submitted in two discrete segments:

- The first segment representing the proponent's written submission.
- A second segment containing the proponent's proposed pricing must be submitted in a separate sealed envelope.

Please provide information as follows:

1. What services are to be provided within the agency commission? What things are to be billed as extras?
2. Describe your agency's use of commission and fee systems.
3. Does your agency charge for layouts, storyboards, merchandising material, roughs, etc., which are not used by the client?
4. What is your policy on agency personnel's travel expenses when incurred on behalf of client activities?
5. Which type of compensation arrangement do you recommend for the University's account: commission, fee, combination, or other?
6. Do you have a formal cost accounting system by which you know the profit picture on each account?
7. Do you review account profitability with your clients?
8. Please include your billable rates for the following services, **if applicable**.
 - Account Director
 - Account Executive
 - Creative Director
 - Senior Art Director
 - Junior Art Director
 - Senior Copywriter
 - Junior Copywriter
 - Public Relations Director
 - Public Relations AE

- Website Development
- Production Manager
- Media Director/Planner
- Media Buyer
- Proofreading
- Production Artist
- Administrative Support

9. Please provide details of any costs not provided in any other section

APPENDIX D - PROPOSAL FORM

APPENDIX(ES) TO PROPOSAL:

Any appendixes as called for in the Request for Proposal must be completed and attached to this proposal form. All appendixes form an integral part of this proposal. I/We enclose:

Appendix	References
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ADDENDA

I/We acknowledge receipt of the following applicable Addenda to the Request for Proposal:

ADDENDUM:	DATE OF ADDENDUM	FROM PAGES	TO PAGES
Addendum No. 1			
Addendum No. 2			

Authorized signing officer

Company Name:	
Address:	Telephone Number:
Signature:	Title:
Print Name:	Date:
WCB Registration Number:	

Note: This Proposal Form must be executed by a principal duly authorized to bind contracts on behalf of the Proponent. The Proponent's legal name and the capacity in which the signing officer acts shall be against the signature. Proposal Forms that do not contain an authorized signature will be rejected.

APPENDIX E - RFP RECEIPT CONFIRMATION FORM

To receive any **further information** about this Solicitation please return this form immediately to the attention of the Purchasing Officer listed in Section 2.4 of the main Solicitation Document.

Please Note: e-mail and faxed Proposal submissions will NOT be accepted

RETURN VIA:

MAIL	COURIER	E-MAIL	FAX
PO Box 1700, STN CSC, Room 110, Saunders Annex Victoria, BC, Canada V8W 2Y2	3800 Finnerty Road Room 110, Saunders Annex Victoria BC, Canada V8P 5C2	purchase@uvic.ca Completed document duly signed and returned as a pdf attachment	250-721-8327 Completed document duly signed and faxed

Failure to return this form may result in no further communication regarding this Solicitation Document.

COMPANY:			
STREET ADDRESS:			
CITY:		POSTAL CODE:	
MAILING ADDRESS IF DIFFERENT:			
FAX NUMBER:		PHONE #:	
CONTACT PERSON:			
E-MAIL ADDRESS:			

We have received a copy of the above noted Solicitation Document.

Yes, we will be responding to this Request.

We will not be submitting a Proposal Submission.

I authorize the Canadian Public Procurement Council to send further correspondence that it deems necessary.

Please send further correspondence about this Solicitation Document by:

Courier collect: courier name and account no. _____

Mail _____

E-Mail _____

Fax _____

Signature: _____ Title: _____

Date: _____

APPENDIX F - ADDENDA ACKNOWLEDGEMENT

I/We acknowledge receipt of the following applicable Addenda to Solicitation Document # **RFP 394**

ADDENDUM:	DATE OF ADDENDUM	FROM PAGES	TO PAGES
Addendum No. 1			
Addendum No. 2			

Authorized signing officer

<i>Company Name:</i>	
<i>Address:</i>	<i>Telephone Number:</i>
<i>Signature:</i>	<i>Title:</i>
<i>Print Name:</i>	<i>Date:</i>
<i>WCB Registration Number:</i>	

Note: This Form must be executed by a principal duly authorized to bind contracts on behalf of the Proponent. The Proponent's legal name and the capacity in which the signing officer acts shall be against the signature. Forms that do not contain an authorized signature will be rejected.

APPENDIX G - REFERENCES

Company Name	
Address:	Telephone Number:

Provide sufficient references to cover the individual reference requests within the RFP. A reference can be used for more than one purpose, but a minimum of three business references and one banking reference is required.

1. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)
2. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)
3. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)