



Request for Proposals

— For —

Marketing Agency of Record

Release Date

Feb 12, 2021

Submission Deadline

March 5, 2021

INTRODUCTION

Statement of Purpose

The Wilderness Tourism Association of the Yukon (WTAY) seeks an innovative, professional marketing agency to help shape, plan and execute its Yukon Wild consumer marketing campaigns, events, and digital presence.

The Tourism Industry continues to face uncertainty because of the worldwide pandemic, and we are looking for a partner that can adapt quickly, demonstrates a strong knowledge of industry trends, research and best practices and is adept at consumer centric marketing including Destination Canada's EQ segmentation.

WTAY values a partner with strong strategic capabilities, who looks to continually inform, update, and improve the work they do with their clients. A demonstrated understanding of wilderness tourism marketing as well as DMO experience is considered an asset to ensure our operators are supported and gain real value from participating in our marketing program.

Our ideal partner provides leadership, insight, and expertise in the field of tourism marketing, communications and advertising.

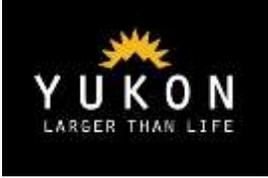
About WTAY

The Wilderness Tourism Association of the Yukon is a not-for-profit, member-based association of over 70 companies that provide wilderness tourism services in the Yukon. It is operated by a volunteer Board of Directors and a paid General Manager. Additional WTAY staffing supports fluctuate based on programming and funding. WTAY represents the general interests of the wilderness tourism industry in the Yukon and provides its members with information, industry news, and training, while representing its constituents on such subjects as environmental issues, funding, and government initiatives that could affect the industry.

Yukon Wild

Yukon Wild is a member-based marketing program focused on consumer marketing in North America. It is funded primarily through a contribution agreement with the Yukon Government. WTAY oversees the Yukon Wild marketing program through support from the WTAY General Manager and with direction from the Yukon Wild Marketing Committee and WTAY Board of Directors. The Marketing Committee is made up of WTAY board and general members.

Further Information

 <p>wilderness tourism ASSOCIATION OF THE YUKON</p>	WTAY industry site: wtay.com
 <p>yukonwild.com</p>	Consumer site: yukonwild.com
 <p>YUKON LARGER THAN LIFE</p>	Tourism site: travelyukon.com

ABOUT THIS RFP

This request for proposals consists of the following sections:

1. Terms and Conditions
2. Scope of Work
3. Submission Requirements
4. Evaluation Methodology

Please read this document in its entirety and respond to all requirements.

Intention to Submit Proposal

To ensure you are apprised of any supplementary information that may be provided, including responses to questions about this RFP, please confirm your intention to submit a proposal no later than Feb 22, 2021 via email to:

Sandy Legge
General Manager
The Wilderness Tourism Association of the Yukon
info@wtay.com

Questions About This RFP

To preserve the integrity of the procurement process, no telephone inquiries, verbal questions, or meetings will be entertained.

Written questions may be submitted via Email only by the specified deadline for submission of questions (see **Timeline**, below).

Answers to questions received by the stated deadline will be published (without attribution) in a consolidated response that will be made available to all proponents.

Timeline

The table below illustrates the critical path and key dates for the procurement process leading up to commencement of work on or around April 5, 2021.

Note: the deadline for proposal submission is: 4:00 pm Yukon Time, Friday, March 5, 2021.

Milestones and Dates (* = not later than target date)	Target Date
RFP released	Feb 12
Deadline for submission of questions and inform intent to participate	Feb 22
Responses to questions published by WTAY	Feb 24
Proposal submission deadline	March 5
Evaluation of proposals completed shortlist notifications*	March 12
Shortlist interviews completed*	March 15- 19
Selection finalized*	March 22
Initial planning meeting(s)*	w/o March 22
Engagement terms/contract(s) finalized*	March 26
Agency hand off, transfer	March 29-April 2
Work commences*	April 5

2. TERMS AND CONDITIONS

2.9 General Terms and Conditions

WTAY reserves the right, at its sole option, and for its convenience, to accept and/or reject any proposal, in whole or in part, for any or no reason. By making this request for proposals (RFP) WTAY does not imply or give any assurance whatsoever that any proposal will be accepted. No contractual or other legal obligations arise on the part of WTAY to any proponent by this RFP until a final, written agreement, if any, is subsequently entered with a proponent.

WTAY may or may not award the business that is the subject of this RFP to any proponent or proponents at WTAY's sole discretion. WTAY reserves the right to negotiate with proponents, seek clarification from proponents regarding their proposal responses and invite modifications to the proposal responses submitted.

WTAY retains the right to withdraw or modify this RFP at any time without notice and without obligation to proponents. WTAY may waive compliance with the requirements of this RFP and consider a proposal response that does not meet all the requirements of this RFP.

Your proposal is submitted at your own risk. If, prior to the deadline for submission of proposals you fail to notify WTAY of an error and your proposal is selected, you shall not be entitled to any compensation or time due to the error or its later correction.

No part of this RFP will become part of any final agreement between WTAY and the successful proponent unless specifically incorporated into a final, written agreement. Any or all contents of your proposal may become part of the final agreement.

Your proposal shall constitute a binding offer capable of acceptance in whole or in part by WTAY, and if selected will remain valid until a final agreement is negotiated and executed.

WTAY shall not be in any way responsible for or liable for any costs associated with your proposal and you shall not make claim to WTAY for any such cost or expenses. By submitting a proposal response, you agree to waive any right to claim damages against WTAY for any reason, cause, or thing arising out of the RFP process.

If you are selected you may be required to provide satisfactory proof of maintenance of relevant insurance coverage (including commercial, professional, general liability and automobile insurance).

1.2 Potential for Conflicts of Interest

WTAY reserves the right to disqualify from further consideration proposals that in WTAY's opinion demonstrate a conflict of interest.

A conflict of interest includes any circumstances where any person or personnel involved in your proposal who has the capacity to influence WTAY's decisions, has commitments, relationships or financial interests that could, or could be seen to, interfere with WTAY's objective, unbiased and impartial judgment relating to the evaluation of this RFP.

You must declare all conflicts of interest or any situation that may be reasonably perceived as a conflict of interest that exist now or may exist in the future. Failure to comply with this requirement will render your proposal non-compliant and will cause the proposal to be rejected.

Any contract awarded as a result of this RFP will be non-exclusive. WTAY may, at its sole discretion, purchase the same or similar services from other sources during the term of the contract.

1.3 Termination

In the event that the successful proponent, in the opinion of WTAY, fails to satisfactorily perform the services in accordance with the terms and conditions of the contract including the instructions to proponents, terms of reference and any other documented terms and conditions, WTAY reserves the right to terminate services without showing cause upon giving at least 10 days written notice.

1.4 Terms of Payment

Payment will be made in response to invoices in accordance with the final executed contract, provided the invoices are based on work/deliverables described in the scope of the project and are consistent with the timetable of each negotiated deliverable, are completed to WTAY's satisfaction, and provided there exists no defaults of obligations.

1.5 Subcontracting and Assignments

It is understood and agreed that the successful proponent will be an independent contractor. Any proposed subcontracting agreements must be approved by WTAY and will not release you from any obligation with respect to the performance of your obligations.

1.6 Errors and omissions

WTAY, its employees, Directors and Officers, agents, and consultants shall not be held liable for any errors or omissions in any part of this RFP. While considerable effort has been made to ensure an accurate representation in this RFP, the information contained in the RFP is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

1.7 Indemnification

The successful proponent shall indemnify and hold harmless WTAY, its employees, Directors, and Officers, agents, and consultants from and against all actions, claims, demands, losses, costs, damages, suits, or proceedings whatsoever which may be brought against or made against all losses, liabilities, judgments, claims, suits, demands, or expenses which may sustain, suffer or be put to resulting from or arising, out of the successful proponent's failure to exercise reasonable care, skill, or diligence or omissions in the performance or rendering of any work or service required hereunder to be performed or rendered by the successful proponent, its agents, officials and employees.

1.8 Confidentiality

The successful proponent shall not at any time before, during or after completion of any contract entered with WTAY, divulge any confidential information communicated to or acquired by you or disclosed by WTAY.

1.9 Acceptance of terms

By submitting a proposal, you represent you have read, completely understand, and accept all terms and conditions of the RFP in full.

2. Scope of Work

Overview

WTAY is seeking a full-service agency or partnership that can supply a broad range of marketing and communication services including but not limited to strategic planning, creative development, media planning and buying with a focus on digital advertising, web development and maintenance, media relations, events, consumer shows, co-op marketing, membership recruitment and social channel management.

Should a partnership be formed to provide the services required a lead agency should be identified and would be the sole signatory to the contract and responsible for all subcontractors and their delivery of service.

Currently we conduct two seasonal campaigns, focused on summer and winter experiences, which primarily target North American consumers.

WTAY's annual marketing allocation – encompassing all activities including media placement and agency fees is estimated at \$220,000 per annum. (This figure excludes one-time projects and periodic investments such as web site re-design/re-development.)

Working with the WTAY Marketing Committee and WTAY General Manager, the selected marketing agency will be responsible for delivery of the following required services for a three-year period. Funding for the 2021-2022 year has been secured and the agreement will be renewed annually each of the remaining two years as funding is confirmed.

Deliverables

Throughout the partnership the agency may be expected to provide the following activities – this should not be considered an exhaustive list but an outline of activities that may take place.

Development of an overall strategy and plan that looks beyond traditional media and digital advertising, identifies ways to engage and promote members and expand the reach, awareness, and impact of Yukon Wild. The strategy should take into consideration and build upon the overall Yukon Tourism Development Strategy. It should also include industry standard KPI's.

Implement consumer centric strategies and marketing using EQ segmentation and the applicable segments identified by the Marketing Committee and based on the agency's research and expertise.

Work to identify and develop strategic and innovative partnerships that benefit both Yukon Wild and the partner and can play a role in delivering and strengthening the campaigns influence and reach.

Develop impactful creative and content for multiple platforms that delivers on the overall strategy and accurately reflects the Yukon and our members. Creative design and content should consider the Travel Yukon brand and content strategy.

Development of a media plan and buy that maximizes the dollars available, includes added values, earned media and partnerships whenever possible. Supply third party research and audits to support campaign recommends and ensure delivery. Regular reporting, optimizing and analytics are expected. WTAY encourages and looks for new and breakthrough approaches to reaching our target.

Maintain and update Yukon Wild's digital presence including the website, newsletter outreach, outbound campaigns and remarketing, social channels and other digital footprint including bringing forward recommendations, best practices, and leading industry trends to ensure Yukon Wild is positioned as a leader and delivers results for members. Any plans should consider influencers, blogs, and amplification of content.

Account management that includes detailed budget control reports, campaign reporting, assists and supports the WTAY staff in securing membership, content from members and fully manages co-op advertising with Premium members.

The agency is responsible for production, booking, delivery and management of all aspects of the campaign. In addition, specific reporting may be required for funding purposes.

3. SUBMISSION REQUIREMENTS

3.1 Proposal guidelines

Your proposal must:

1. Be received by the specified submission deadline.
2. Be submitted electronically via e-mail (only) as a PDF file (including any attachments).
3. Not exceed 25 pages in length, excluding work samples.
4. Be accompanied by a cover letter certifying the accuracy of all information contained in your submission and acknowledging your offer of services according to: The **Terms and Conditions** set out in Section 1.
5. Include responses to all questions in Section 3.4.

3.2 Submission

It is your responsibility to seek clarification of any matter that you consider unclear before submitting your proposal by the deadline specified herein for submission of written questions. WTAY is not responsible for any misunderstanding or misinterpretation of this RFP document or requirements.

Proposals must be submitted via e-mail only to:

Sandy Legge
General Manager
Wilderness Tourism Association of the Yukon
info@wtay.com

3.3 Proposal Submission Deadline

The deadline for proposal submission is: **4:00 pm Yukon Time, Friday, March 5, 2021.**

3.4 Proposal Outline

Please cite each question in framing your responses and provide clear and concise answers.

1) Mandatory Technical Requirements

Marketing campaign experience is essential, with preference for the proponent who demonstrates experience in Wilderness Tourism, Yukon and/or DMO experience. Proponents who do not meet this mandatory requirement will not be considered.

Rated Criteria

The following is an overview of the categories and weighting for the rated criteria of the RFP. Proponents who do not meet a minimum threshold score will not proceed to the next stage of the evaluation process – presentations.

2) Company Overview

Provide a brief overview of your company. It should include:

- Business operating name
- Years in business
- Sample list of clients including any in Yukon and any tourism clients
- Staff complement
- Primary address and associated offices
- Primary contact details

3) Understanding of the role

We are looking for an insightful partner, one who gets us and who we can work with, one who loves what our members offer. We like to try new things and we know right now more than ever we will have to work hard to rebuild.

Please provide your interpretation of Yukon Wild's and the industry's current environmental situation and how you/your organization would be able to help WTAY meet its objectives for a strong, integrated campaign. This should be expressed in your own words and not simply reciting the requirements as defined in this RFP.

4) Relevant Experience

We want to see your great work. The stuff you like to brag about, that created results and an impact.

Please provide three case studies of relevant experience in developing and implementing similar types of campaigns and the services we have outlined in the scope of work. At least one example should be for a wilderness/adventure tourism, or DMO client. Identify team members proposed for our account and their role in the case studies.

Examples should include the type of activity (strategic development, creative, media buy/blocking chart, content creation, webpages, social media, co-op marketing, working with social influencers and/or PR activations), KPI's, results and learnings. Samples of work should be included.

Now the hard part. Please provide one case study where you failed, it just did not work. The one you all learned from – maybe it was the placement, maybe the creative, maybe the timing.

Ideally it is for a wilderness/adventure tourism, or DMO client but does not have to be.

Include the type of activity (creative, media buy/blocking chart, content creation, webpages, social media, co-op marketing, working with social influencers and/or PR activations), KPI's, results and most importantly learnings. Samples of work should be included.

5) Unique Differentiators

What makes your company different and why should we choose you?

6) Fit

Identify the **team** proposed for this project including the account lead, all members proposed, their current roles, responsibilities and experience and the role they would play on this account. Provide brief bios for each team member proposed for this account. Keep in mind the services outlined as part of the Deliverables in Section 2- Scope of Work.

If sub-contractors or partners are being used, please describe the general range of services that the respective contractors (companies or individuals) will provide.

Please include a detailed outline of your workflow and process with a client. We seek transparency and collaboration while respecting and valuing the expertise and accountability of our contractors. Your workflow should indicate how you can achieve these priorities in working with us.

7) Implementation Plan

The successful Proponent is expected to provide all the necessary project management to complete the services proposed in response to this RFP.

Provide a proposed implementation plan consisting of a high-level work plan and timeline outlining tasks, resource requirements, milestones, and deliverables. Specify any assumptions. Outline any guidelines you use for budget allocation.

8) References

Provide three references – at least one should be from your case studies, and one, a tourism client. Include client name, their role/title, services you provided, and email and phone number.

9) Price

Bidders should propose a financial model that clearly defines how they propose to be compensated for all the required services. It may be a retainer, hourly, mark up or a combination. You are required to estimate total annual fees from all methods and points will be assigned based on that total.

For Hourly Rates please supply service, rate, and estimated time on the account for the year.

Service	Rate/hr	Estimated Time
Account Management		
Member Recruitment and Co-op Ad Management		
Strategy		
Creative Development		
Design		
Copy Writing		
Copy Editing		
Content Creation		
Production Art		
Web Maintenance		
Web Development		
Social Media Management		
PR/Media Relations		
Media Planning		
Media Buying		
Event Management		

1. **Estimated Annual Hourly Fees:** \$ _____
2. **Proposed Retainer Annually:** \$ _____ (outline services included)
3. **Estimated Mark Up and Additional Fees** \$ _____

Please provide an outline of any mark ups you charge on travel, media placement, hard costs and supplies, printing, or other materials/services as well as any admin and studio fees. Net supplier invoices for all hard costs must be provided as part of the reporting.

Total Estimated Annual Fees 1+2+3= \$ _____ your price bid

4. Evaluation Methodology

Proposals will be evaluated against the following criteria. Proponents shortlisted for finalist consideration will be interviewed and will be required to make a presentation, which will also be assessed as part of the selection process.

Rated Criteria Category	Weighting (Points)
Company Overview	5
Understanding of Role	20
Relevant Experience	20
Unique Differentiator	10
Fit	15
Implementation Plan	15
References	10
Price	10
Total	100

Pricing will be scored based on a relative pricing formula using the total annual estimated rates including hourly, retainer, and mark ups, additional fees as submitted by proponents.

Each Proponent will receive a percentage of the total possible points allocated which will be calculated by dividing that Proponent's price for total estimated annual fees into the lowest bid price. For example, if a Proponent bids \$10,000 estimated hourly fees+ \$0 retainer + \$10,000 estimated annual mark up and additional fees = Total \$20,000 estimated annual fees and that is the lowest bid price, that Proponent receives 100% of the possible points for price. ($20000/20000 = 100\%$). A Proponent who submits a total of \$25,000 estimated annual fees receives 80% of the possible points for that category ($20000/25000 = 80\%$), and a Proponent who bids \$40,000 receives 50% of the possible points for that category ($20000/40000 = 50\%$).

$$\frac{\text{Lowest rate}}{\text{Second-lowest rate}} \times \text{Total available points} = \text{Score for second-lowest rate}$$

$$\frac{\text{Lowest rate}}{\text{Third-Lowest rate}} \times \text{Total available points} = \text{Score for third-lowest rate}$$

And so on, for each proposal.

The top three proponents that meet a minimum criterion of 70 will be shortlisted for presentation. If only one proponent meets the criteria, we reserve the right to waive the presentations.