Elections Canada

Procurement and Contracting Services
257 Slater Street
Ottawa, Ontario K1A 0M6

REQUEST FOR PROPOSAL AMENDMENT

The Request for Proposal is hereby amended; unless otherwise indicated, all other terms and conditions of the Request for Proposal remain the same.

RFP Amendment No.	RFP Amendment Date:
2	July 30, 2013

Office of the Chief Electoral Officer File No.

ECST-RFP-13-0058

Title:

Strategic Planning, Creative Development and Multimedia Production Services

Request for Proposal Closing Date:

August 20th, 2013

ENQUIRIES – address enquiries to the Contracting Authority:

Office of the Chief Electoral Officer of Canada
Procurement and Contracting Services
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Part 1. Interpretation

1.1 Elections Canada hereby amends in accordance with this amendment the Request for Proposal for Strategic Planning, Creative Development and Multimedia Production Services bearing number ECST-RFP-13-0058 and dated July 9th, 2013 (the "RFP"). This amendment hereby forms part of the RFP.

1.2 Unless defined herein or unless the context otherwise requires, all of the words and phrases defined in the RFP and used in this amendment shall have the same meanings assigned to them in the RFP.

Part 2. Questions and Answers

The following questions have been asked in response to the Request for Proposal and Elections Canada hereby answers as follows:

2.1 **Question No. 3**
In the amendment published on July 18, the document refers to a revised Appendix B, "...document attached herein (total 7 pages). " The document is not attached. Can you please clarify?

Answer No. 3
The revised Appendix B – Electoral Reminder Program to Annex A – Statement of Work (total of 7 pages) is attached to this amendment. The French version does not require any rectification.

2.2 **Question No. 4**
Does the Technical Proposal response comprise of answering only PART 7? (Part 7, beginning with question M1, M2, M3 and R1 through R9, for a total of 24 pages?)

Answer No. 4
Correct.

2.3 **Question No. 5**
Please define what is meant by "level of effort" indicated in Part 8, Phase 1 CPRF Template, Part II Costs Breakdown and in Annex D, Production Costs Breakdown?

Answer No. 5
Level of effort is the direct labour time in hours, by category of personnel, estimated to complete a task.

2.4   Question No. 6
In Part 8, Phase 1 CPRF Template and Part II Costs Breakdown Template: can you confirm that Labour Costs/Subcontract Costs/Travel and Living Expenses/Value attributed to Aboriginal Commitment should be the total sum of Y1, Y2 and Y3?

Answer No. 6
Yes

2.5   Question No. 7
In Part 8, Annex A, Table A, Item 2 and Item 3, can you clarify what is meant by "actual labour costs billed." Can you provide a Production Services Scenario (similar to Annex C in Part 8) for section 5 and 6 of the SOW, *Services Related to Other Electoral Events* and *Other Services Related to EC's Corporate Programs and Initiatives* referred to In Part 8, Annex A, Table A, Item 2 and Item 3? Or, please clarify the required information for Item 2 and Item 3.

Answer No. 7
The actual labour costs billed in any given month would be the total of the actual hours worked by the various categories of personnel multiplied by the firm time rates for that same period.

The requirements in Section 5 and 6 cannot be meaningfully defined, could be as small as a by-election or as large as a general election or referendum. In all probability the creative development would entail revisions to existing advertising products. Production services could range from local to national depending on the requirement.

There is no additional information required for Part 8, Annex A, Table A, Item 2 and Item 3 other than a firm percentage which will cover all management services required.

2.6   Question No. 8
In Part 8, Annex A, Table B and C, should "Subcontract Cost" include "Value attributed to Aboriginal Commitment" amount requested in Part 8, Annex B Part II and Annex D, Production Cost Breakdown"

Answer No. 8
In Part 8, Annex A, Tables B and C the "Value attributed to Aboriginal Commitment" should be included either in labour costs, if the bidder is employing aboriginal resources, or in subcontract costs, if the bidder is subcontracting to an aboriginal firm, as applicable.

2.7   Question No. 9
In Part 8, Annex B, Phase 1 CPRF Template, Part I, do we include or exclude production

services tasks in "Task description"? If we include production services tasks, the Planned Total in Part II will not match as production services are not included in Annex B, Part II. Is this intentional?

Answer No. 9
Production Services should not be included in Part 8, Annex B, Phase 1 CPRF Template Part I. The Production Cost Breakdown is to be detailed in Part 8, Annex D.

2.8   Question No. 10
In Part 8, Annex B, Phase 1 CPRF Template, Part II Costs Breakdown and Annex D Production Costs Breakdown; should the Total planned amounts be used to complete Annex A, Table B and Table C ?

Answer No. 10
Yes

2.9   Question No. 11
Part 8, Annex A, Table A Item 1, Management Services, do you want the detail? Should the amount be reflective of a 3 year mandate duration or 6 year?

Answer No. 11
The Management Fee required in Item 1 is only for the "Campaign" defined in the SOW as "a national multimedia advertising campaign developed by the Contractor for EC for the General Election". "General Election" is defined in the SOW as "the first federal general election during which the Campaign developed by the Contractor is implemented". The amount quoted will only apply to the Campaign which will occur within the period from date of contract award to 31 March 2016. Any subsequent management fee for an electoral event will be calculated by applying the percentage quoted in Part 8, Annex A Table 1, Item 2 to the actual labour hours billed.

2.10   Question No. 12
In Part 8, Annex A, Table B- Ceiling Price is required for three years, yet the mandate duration is 6 years. Is this intentional?

Answer No. 12
Yes. The Ceiling price only covers the Campaign which will occur within the period from date of contract award to 31 March 2016.

2.11   Question No. 13
In Section R1 the RFP states that "the bidder should have experience handing corporate accounts which required the design, development and distribution of Canadian national bilingual multimedia advertising campaigns for multiple target audiences". Is work done for

the Government of Canada considered a corporate account?

Answer No. 13
A government department or agency would be considered a corporate account. Multiple small accounts with various government departments would not be considered one account valued over $1M annually.

2.12 **Question No. 14**
In R8.1 the RFP states that a "major advertising account means a corporate account generating billing in excess of $1M annually." What is your definition of "corporate account?" Is work done for the Government of Canada considered a corporate account? Also does the experience managing a major advertising account for the Account Management Resource need to be limited to accounts managed with the resources' current employer, or can experience also include accounts worked on with previous employers?

Answer No. 14
A corporate account is an account with a private corporate entity or government department or agency where the bidder provides services for multiple or ongoing campaigns.

See response to Question 13 above.

Any management experience of the individual proposed as the Account Management Resource will be considered whether it was obtained with the current or previous employers.

APPENDIX B
Electoral Reminder Program (ERP) Enhancement Initiative

Background

The Electoral Reminder Program (ERP) is a multimedia election communications and information campaign for implementation during federal general elections. Its objective is to provide electors with needed information about when, where and how to register and vote.

The program helps to fulfill mandates stated in section 18 of the *Canada Elections Act:*

(1) The Chief Electoral Officer may implement public education and information programs to make the electoral process better known to the public, particularly to those persons and groups most likely to experience difficulties in exercising their democratic rights.

(2) The Chief Electoral Officer may, using any media or other means that he or she considers appropriate, provide the public, both inside and outside Canada, with information relating to Canada's electoral process, the democratic right to vote and how to be a candidate.

The existing program has six components:

1) A multi-phase <u>advertising</u> campaign on radio and television, in newspapers, on backlit billboards in public places, and on popular social media websites.

2) A <u>direct mail</u> campaign that includes mailing of a Voter Information Card (VIC) to all registered electors and an election Reminder Brochure to all Canadian households to provide electors with information they require to register and vote.

3) A communications drive to highlight a comprehensive and up-to-date <u>website</u>.

4) On-the-ground cross-country <u>media relations</u> in support of common messaging.

5) A <u>public enquiries service</u> operating seven days a week.

6) <u>National outreach and partnerships</u> and <u>network of Community Relations Officers</u> across the country in electoral districts where significant population segments – mainly seniors in long-term care facilities, youth, homeless people, Aboriginal and ethnocultural electors – experience barriers to the electoral process.

ERP activities change as the electoral calendar progresses. Broader, more general information is presented immediately after the election call, and this gradually becomes more specific as the Election Day approaches. Within the calendar, activities peak ahead of advance polls, before deadlines to vote by special rules, and immediately before and on Election Day.

Past results of the program show its success. Evaluation reports of the 41st general election indicate that 98 percent of electors were aware of the election and the polling date, 91 percent recalled receiving the VIC, 97 percent were aware of ID requirements and 78 percent also recalled seeing one or

more election advertisements. Clearly, the ERP succeeds in delivering information to the vast majority of electors.

However, there remain a few hard-to-reach population segments that require increased attention under ERP, particularly younger or first-time voters and First Nations electors.

Issues

In light of the current operating environment the core ERP messaging needs to be reviewed.

Events during the May 2011 general election - whether it is the robocalls issue or the procedural failures in Etobicoke Centre - have the potential to erode the high degree of trust Canadians have in their electoral process. In that context communications recommendations made in the reports on Deceptive Communications with Electors and on the independent Compliance Review will need to be incorporated into the program.

Building on elements of ERP's success and to better reach population segments that are less aware of the registration and voting procedures than the general population, it is important to reinvest in the program model so that it reflects up-to-date communications technology, is cost-effective while maintaining its desired reach, and is comprehensive and easily accessible to all electors. The ERP enhancements address four key goals:

Consistent branding across all program elements

The ERP was developed in an ongoing minority government situation, at a time when communications was decentralized across Elections Canada. The result is that the program offers a variety of communications products in a variety of mediums including over 65 different print publications lacking consistency thematically, visually and linguistically.

Multiple visual identities and messages raise the risk of confusing electors. In contrast, audiences have stronger recall and retention of information if it is presented repeatedly using consistent images and messages - common look and feel - across all media.

To the extent possible, communications products and the user environments should be designed to be practical by all audiences, by offering maximum flexibility, benefits, and ease. Continuously using a cohesive design, simple messaging and plain language will address concerns raised by groups that have experienced barriers. These groups have consistently told Elections Canada that they support this approach, and that existing communications materials are complicated and difficult to understand.

Messaging that supports the current operating context

Both the reports on Deceptive Communications and the Compliance Review highlight the importance of maintaining and continuously earning the electors' trust in the electoral process and in Elections Canada.

Consequently, a recommendation was made to include clear messaging on procedures when polling sites are changed late in the electoral process. Evidence suggests that Canadians do not understand the respective roles of Elections Canada and political parties in providing information about where and how they can vote. Indeed, 64% of electors thought it appropriate for political parties and candidates to

provide them with this information. Complaints are a manifestation of concerns electors may have in the electoral process and therefore a new complaints intake process will be introduced which will need to be integrated into the ERP.

Since the 40th general election in 2008, ERP messaging has focused on voter identification requirements and our research indicates that electors have a high awareness about what ID is needed at the polls. There is an opportunity to lessen the emphasis on providing detailed information on identification requirements within the program while at the same time promoting the addition of the Voter Information Card as proof of address.

New service enhancements for electors -- E-registration system, Expanded SVR and potentially Pre-event registration drives depending on their timing -- will have an impact on how, when, what and where information will be needed to promote these services through supportive messaging.

Renewed creative advertising concepts

In 2008, new voter identification requirements led to the creation of a communications campaign focused on those requirements and it also used the tagline "Vote. Shape Your World". Originally, the tag line had been fashioned to support more compelling creative concepts focused on social issues considered important for voters (i.e. health care and the environment). For a variety of reasons these concepts were never used and the creative execution of the 2008 campaign was dominated by the voting information on ID requirements supported by the tag line and the graphic element ⊗ - the *X* used to mark a ballot. The same campaign was implemented for the 41st GE. While recall of the television advertisements was high according to industry standards, evaluations indicate that the campaign was fragmented had little visual appeal and wasn't very memorable.

The 41st general election advertising campaign evaluation conducted by Impact Research also found that there was support for developing a campaign that better reflects changing media consumption habits of electors with more electronic touch points. As well, the research indicated that the content of the advertisement needed to focus on the most actionable information by reducing the number of elements of information communicated in certain media and by focusing on its timely delivery in the election cycle.

Introduction of social media within the media mix

As noted above, changing media consumption habits require more modern electronic touch points. Canadians of all demographics increasingly use electronic communications tools to stay connected, watch TV/movies on-line, visit YouTube/music sites, and get their information and news. The last decade has seen profound and rapid changes in the communications landscape and Canadians increasingly use social media networks, such as Facebook and Twitter to connect. With this growth, electors now expect access to information at their fingertips quickly. Social media vehicles and mobile technologies are an opportunity to improve campaign efficiency and delivery.

There is currently no credible information source on social media platforms during a federal election which has led to in accurate information being shared among users. The absence of any form of corporate EC presence saw the use of social media by various returning officers during the last General Election and this practice can be expected to grow. Elections Canada has not established policies and procedures to support the use of social media by either field staff or its headquarters staff which could put the agency at risk of losing control of the messages being communicated.

Impact on Audiences

A modern multilayered Election Reminder Program needs to prioritize the delivery of basic information to the general population, using formats that are accessible to all electors and a media mix that has the greatest impact. As well, additional and more focused efforts are needed to reach out to the percentage of the population of electors that experience barriers. Information barriers are cited as one of the reasons some electors are prevented from exercising their right to vote, particularly youth, Aboriginal electors and electors with disabilities.

Finding the right balance to fulfill the basic information needs for mainstream electors as well as specific elector groups who are known to have lower levels of awareness of when, where and how to register and vote, will be fleshed out in the development of the communications and media strategies.

The overview that follows is meant to provide some of the awareness levels and media consumption patterns of various target audiences which will be further analysed to ensure that communications are tailored appropriately for greatest impact.

General Population

Our evaluation of the 41st general election indicates that a majority of electors are aware of the various ways they can participate in an election. More electors are using our website to obtain information on the voting process and continuing to emphasise the EC website as the authoritative source about voting and the election will be essential. In 2011, we received more than 5 million visits, compared with 3 million in 2008. Also in 2011, we received fewer phone calls but more emails, as a result of a push to electronic platforms. Some reports show that electors should be reminded more frequently about the election process through modern communications tools such as social media or text messaging.

The ERP's continued success depends on its ability to adjust as Canadians change their communications and information consumption habits.

Seniors living in long-term care facilities

Seniors living in this environment generally obtain services for elections through the Senior Community Relations Officers. However, as the population ages, more and more seniors are choosing to continue to live in their homes as long as possible, obtaining the services they need delivered directly to their own homes. This trend will affect how voting services are delivered to these electors in the future and may also impact how we communicate to them.

Ethnocultural electors

Survey results from the 41st general election indicate that the voting behaviours and attitudes of ethnocultural electors are similar to those of Canada's general population. Research indicates that the odds of participating in the electoral process are largely based on age, levels of education and level of civic engagement. The most cited suggestion to encourage participation is to provide communications in a variety of languages, face-to face contact, culture specific advertisement and better education on the voting process. Elections Canada offers materials in a variety of languages and as well has an ethnocultural community relations officer program.

Electors with disabilities

Feedback received from organizations representing people with disabilities supports the need for information in plain language, produced in a variety of formats, and more universal in their design.

These organizations stress the need for design approaches to information that provides more flexibility and choice to the entire electorate, regardless of their abilities. They also stress the need to educate and inform by producing information in plain language, and the need to seek their help to test and disseminate this information (in all formats), before an election.

Aboriginal electors
Levels of awareness are lower among Aboriginal electors than the general population. According to our evaluation of the 41st general election, for Aboriginal electors television remains the main source of information about an election. However, a recent study shows that Aboriginal electors, particularly youth, are connecting through social media. A more segmented approach targeting urban versus rural/remote aboriginal electors will be fleshed out to ensure appropriate communications tools and media mix are used to reach them.

Youth
Reports from the 41st general election show that compared with the general population, Canadians aged 18 to 34 have lower levels of awareness of the election, the voting process and voting requirements. Nearly half are unaware of any of the three options for voting other than at the polls on Election Day. Young electors are less likely to receive a VIC and less likely to rely on traditional media for information. They display higher rates of subscription to social media groups and tools, increasingly rely on their peers for information, and are attracted to participatory models of information communication.

Vision Statement

Our goal is to enhance the ERP efficiency by presenting appropriate levels of election information using a consistent look and feel in formats that are accessible to all Canadians.

The Canadian electors – including specific elector groups – will have access to clear, credible, relevant and engaging information about the electoral process. The information will be available from a trusted source, at the right time and tailored to electors' profiles and media consumption habits.

Enhancements

In response to the issues highlighted in Section 2 and to achieve our vision for the program, investments will need to be made in the following <u>four</u> areas:

1. Consistent Branding Across all Program elements – Common look and Feel

One common look will be applied across all program elements and a review of all program materials will be completed. We anticipate that the number of information pieces will be reduced from previous general elections and that those needed for 2015 will be redesigned using more plain language following the development of a common look and feel exercise. Visuals, messages, terminology and formats will be aligned in all products for increased recall and retention. This will include the EC voters' section of the website or a new EC Voters Website, as well as information kits and materials used in the field by community relations officers.

2. Messaging that supports the current operating context - A New Communications Strategy

A new communications strategy will be developed taking into account the current operating environment. Part of the strategy will entail the creation of a messaging matrix which will guide the

development of all external communications products, including products used in the field. The messages will be written in plain language and in both English and French along with a variety of heritage and aboriginal languages, and will be adapted to target audiences using a media-mix appropriate to the type of messaging for each medium. The preliminary thinking on messages, in order of priority, is outlined below:

- Where, when and how to register and vote – Are you ready to vote?
- Positioning of EC as the authoritative source of information for the election information - EC role and complaints process
- New service offerings as applicable

Given the diversity of messaging, consideration will be given to separate ERP phases/ themes as well as adding a pre-event communications phase so as not to dilute particular aspects of the program.

3. Renewed creative advertising concepts

The agency's new creative advertising firm will be tasked with reviewing the existing creative taking into consideration the current operating context, the established communications strategy and messaging matrix with the goal of developing a renewed creative approach and strategy. The resulting creative concepts may involve a combination of information and motivational elements, depending on the target audience and the particular message being conveyed. This will be further explored as part of the research and planning phase of the project.

4) Introduction of social media within the media mix

The ERP media mix will be revisited with the view of finding innovative ways to reach electors of all demographic groups including the full range of available media platforms (traditional and new).

The new media placement strategy will integrate social media tools into its media mix as the demand from the electorate to receive information through these vehicles continues to grow. The use of social media will be explored as a means to complement traditional media in delivering a comprehensive communications program. The use of social media as an advertising vehicle (like television and radio) and as a means to interact with Canadians and provide them with the information they need to register and vote will be explored. Social media vehicles and mobile technologies are an opportunity to improve campaign efficiency and delivery.

The social media program will likely take the form of an election-specific social media presence that will provide timely messages as part of a predetermined calendar of events. For example, EC could use social media to push reminders to vote, countdown to advanced polls and to voting day, encourage sharing electoral information that others could then share with their own networks (peer to peer), etc. It could also be used to respond to unforeseen situations in which the public may need timely information. The program will also need to include a social media policy for field staff. A detailed approach will be presented in due time.

Expected Results and Benefits

- Increased awareness among specific elector groups and the general population of when, where and how to register and vote.

- Maintain awareness among the general population of when, where and how to register and vote.

- Positioning of Elections Canada as the authoritative trusted source of electoral process information by establishing baseline measures on the role of EC and its new complaints process.

- Streamlined communications product lines and reduced long-term cost of maintaining a large inventory of publications.

- Established baselines measures for awareness of new service enhancements (e-registration service, VIC as proof of address, Pre-event Registration Drives, SVR Expansion).

Risks

The enhancements to the ERP will create a more seamless and modern communications campaign that fits the current operating context.

A primary concern will be the inclusion of social media in the media mix. Its implementation could raise expectations that Elections Canada respond to questions through social media on an individual basis. However not implementing it will create a missed opportunity to reach certain segments of the population and present EC as credible source of election. These issues can be mitigated by using social media as a push communications tool and by posting responses to recurring questions raised or misinformation posted on social media by Canadians. Terms of use will explain this approach and will be posted on EC's social media sites. Potential further risks and mitigations will be identified as part of the Governance and Operational plan to be developed as part of this project.

Finally, by being more proactive in promoting the new complaints intake process, the agency could experience significant volume in this area. To mitigate this risk a complaints framework will need to be put in place that defines an official complaint, identifies and publishes service standards, has established capacity to respond to anticipated volume, has established protocols and has a clear mandate to address complaints.