

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des soumissions
- TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution
Communication Procurement Directorate/Direction de
l'approvisionnement en communication
360 Albert St. / 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

Title - Sujet Advertising Technology Provider		
Solicitation No. - N° de l'invitation EP361-150005/A		Amendment No. - N° modif. 004
Client Reference No. - N° de référence du client EP361-15-0005		Date 2015-04-02
GETS Reference No. - N° de référence de SEAG PW-\$\$CZ-008-66975		
File No. - N° de dossier cz008.EP361-150005	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-04-22		Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Enquiries to: - Adresser toutes questions à: Granger, Dominique		Buyer Id - Id de l'acheteur cz008
Telephone No. - N° de téléphone (613) 990-4033 ()		FAX No. - N° de FAX (613) 949-1281
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:		

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

Solicitation No. - N° de l'invitation

EP361-150005/A

Amd. No. - N° de la modif.

004

Buyer ID - Id de l'acheteur

cz008

Client Ref. No. - N° de réf. du client

EP361-15-0005

File No. - N° du dossier

cz008EP361-150005

CCC No./N° CCC - FMS No/ N° VME

Amendment 004 - Bidder's Conference

This amendment is raised to provide the minutes of the Bidder's Conference held on March 23, 2015 and to advise all bidders of the questions and answers pertaining to this Request for Proposal.

MINUTES OF THE BIDDER'S CONFERENCE

Date: March 23, 2015

Time: 1:00 pm

Agenda for the meeting

1. Welcome participants to the Bidders' Conference – Anne Laurin (Manager, Advertising Procurement Division)
2. Presentation by the Communication Procurement Directorate – Anne Laurin
3. Overview of the Requirements and key changes - Louise de Jourdan (Director, Advertising Coordination and Partnerships Directorate)
4. Overview of the Request for proposals - Myriam Sigouin (Team Leader, Advertising Procurement Division)
5. Question period
6. Adjournment of the meeting

1. Presentation by Anne Laurin

Thank you all for joining us this afternoon and participating in the Bidder's Conference for the Request for Proposals (RFP) for the Government of Canada's (GC) Advertising Media Buying Agency of Record (AOR) and Advertising Technology Provider (ATP).

- **Agency of Record (AOR)**
EP361-151112/A

- **Advertising Technology Provider (ATP)**
EP361-150005/A

Available on: buyandsell.gc.ca

Government advertising is a resource for Canadians to get timely, clear information about diverse subjects from the broad range of government programs and services to public health and safety issues.

The Government of Canada spends approximately \$60 million on placement of advertising annually.

Public Works and Government Services Canada (PWGSC) is seeking bids from interested suppliers to act as the Government of Canada's Agency of Record to negotiate and purchase all media space and time for its advertising.

- **AOR includes Media planning services**
 - Will form part of the new AOR mandate – It is intended to streamline execution and increase efficiencies.
- **Advertising Technology Provider**
 - The Government of Canada is also seeking the services of a supplier to fulfill a new mandate.
- **Exclusivity Clause**
 - Clause removed between creative Ad Agencies and AOR; and
 - Clause will now be included between the AOR and the ATP.

PWGSC is committed to an open, fair and transparent competitive procurement process for goods and services that provides the best value for Canadians.

To encourage interested advertising companies to bid on these opportunities, PWGSC has consulted with various stakeholders and addressed several industry concerns.

Both RFP's include instructions on how to bid and details on how bids will be evaluated to be considered for the Agency of Record or the Advertising Technology Provider requirements.

Bids will be evaluated according with the published evaluation criteria in each of the RFP's.

Representatives of the Government of Canada and of the Association of Canadian Advertisers (ACA) will evaluate the bids.

The Basis of Selection for both the AOR and the ATP will be based on the highest responsive combined rating of technical merit (70%) and price (30%).

The successful bidders (AOR and ATP) will be requested to submit financial statements to evaluate their financial capability prior to either contract being awarded.

The exclusivity clause will no longer be in effect between firms holding an advertising Standing Offer or Supply Arrangement and the AOR requirement.

To avoid the conflict of interest or the potential conflict of interest an exclusivity clause will form part of the Agency of Record and the Advertising Technology Provider Contracts.

A parent corporation, its subsidiary corporation, and any body corporate may not hold both the AOR and ATP contracts.

Important Dates:

Deadline to ask/send questions	April 10
Solicitations closing date	April 22

More information on the advertising practices of the Government of Canada can be found at:
<http://www.tpsgc.pwgsc.gc.ca/pub-adv/index-eng.html>.

2. Overview of the Requirement by Louise de Jourdan

There are a number of organisations involved in managing government advertising. The process is designed to ensure that campaigns align to government priorities, comply with government Acts, policies and procedures and meet the communication needs of Canadians.

The annual advertising cycle begins with departments working with Privy Council Office (PCO) to prepare proposals for major advertising campaigns. PCO prepares an advertising plan for Cabinet approval. Once Treasury Board has approved funding, departments work with Public Works and Government Services (PWGSC) – Communication Procurement Directorate (CPD) to contract an advertising agency to develop creative elements, media strategies and detailed media plans.

Media plans and creative elements are submitted PWGSC – Advertising Coordination and Partnerships Directorate (ACPD) to ensure that they comply with all policies and procedures (for example, the Federal Identity Program, *Official Languages Act*, etc.)

The Agency of Record executes the media buy after receiving a Work Authorizations issued by CPD.

The AOR is managed by ACPD.

Departments report on results and PCO provides oversight at every stage.

The model works well for advertising in traditional media. For digital advertising, the AOR has additional responsibilities: serving the ads, reporting on their performance and recommending ways to improve or optimize performance. In the current model, the optimization piece can be cumbersome if a change to a media plan is needed – because departments have to cycle back to their creative agency, then through PWGSC to get back to the AOR to implement the change, which takes too much time.

Since the Government of Canada has invested more heavily in digital advertising over the last few years (from around 8% in 2009-10 to nearly 25% today), this weakness in the system has become a major issue.

Information about government media buying patterns, across all media, is available on page 39 of the AOR RFP and page 34 of the ATP RFP.

After a year-long round of research and consultations with departments, industry associations and other advertisers, we saw the need to change our media planning, buying and reporting model.

We still have the same fundamental goal ... to maximise administrative and financial efficiencies, but we also want faster, more flexible services so we can more readily adapt and keep pace with changes in the industry.

Aside from needing to be able to execute digital campaigns more efficiently, departments also want to take advantage of the incredible amount of performance data available from digital media. That means more timely access to reports and simpler, faster processes for in-campaign course corrections.

The government as a whole also wants to leverage this information to promote greater horizontality across campaigns, share learning and, over-time, gain a deeper understanding of what works in order to improve strategies and efficiencies.

So, we shifted certain roles and responsibilities and introduced a new service (the Advertising Technology Provider) to create a centralised campaign information hub for collecting insight data and tracking digital campaign performance.

Here's what it looks like:

- The AOR assumes responsibility for media strategy and preparation of detailed media plans along with the preparation of trafficking instructions, which were previously done by the creative agencies;
- The creative agencies' role will be strengthened. As 'lead agency', they will be responsible for the overall campaign strategy;
- A new function, the Advertising Technology Provider, will serve digital ads, manage the demand-side platform, report on display ad performance, manage a data management platform and develop tailored dashboards.

In addition to streamlining media management processes, segregating digital ad buying and performance reporting will strengthen accountabilities.

Further to this point, as was mentioned by Anne, the same supplier cannot be both the GC's AOR and ATP.

3. Overview of the Requests for Proposal by Myriam Sigouin

Both documents for the AOR and ATP are built the same but the information requested is different.

The RFP is divided in seven (7) parts and four (4) annexes.

The entire document is important but here are some key points:

Part 2 - Bidder Instructions.

Bids must be submitted only to PWGSC Bid Receiving Unit indicated on page 1 of the bid solicitation and before the closing date of April 22, 2015 at 2PM.

All enquiries must be submitted in writing to the Contracting Authority **no later than ten (10) calendar days before the bid closing date**. Enquiries received after that time may not be answered due to time constraints.

The Contracting Authority for the Advertising Technology Provider is Dominique Granger

The Contracting Authority for the Agency of Record is Myriam Sigouin.

Part 3 - Bid Preparation Instructions

Bids must be divided in 3 sections:

- **Technical Bid** : as per Annex "C" Evaluation criteria.
- **Financial Bid** – as per Annex "B" Basis of Payment, under B.1.
- **Certifications** – all certification under Part 5.

Part 4 - Evaluation and Basis of Selection;

To be declared responsive, a bid must:

- Comply with all the requirements of the solicitation
- Meet all mandatory requirements
- Obtain the minimum points for each selected rated criteria or groups of criteria and the overall passing mark of 750 points of a scale of 1000 points.

The ratio will be **70 %** for the technical merit and **30 %** for the price.

Part 5 – Certifications, all certifications that needs to be submitted

Part 6 - Financial Requirement

Financial Capability

The Bidder must have the financial capability to fulfill this requirement. The Contracting Authority may, require the submission of some or all of the financial information described in the clause.

Financial Security for the AOR only

A financial security will be required within 10 days after contract award.

Part 7 - Resulting Contract Clauses

All the clauses and conditions that will be part of the resulting contract.

The period of the Contract is for three (3) years from the award date with an option to extend the term of the Contract by up to two (2) additional one (1) year periods under the same conditions.

Annex A - Statement of Work

Annex B – Basis of Payment and Financial Evaluation.

B.1 to be used by bidders to submit financial bid.

B.2 example of how the financial bid will be evaluated.

Annex C – Technical Evaluation Criteria. Mandatory and rated requirements

Please follow presentation guidelines of the proposal you will be evaluated on

Annex D - Evaluation Grid. The evaluation Grid is for information only and bidders do not need to fill it out. The evaluation team will use the grid to evaluate the proposals.

To conclude you have to submit with your bid

Part 5 certifications

Annex B – Basis of Payment B.1 all rates and fees for all periods

Annex C –Evaluation criteria; everything requested

4. Question period

QUESTIONS AND ANSWERS

Question 1

If the trafficking instructions are created by the AOR, will the actual trafficking be done by the ATP?

Answer 1

Yes. The actual trafficking will be done by the ATP, as it will manage the ad server; however, the AOR will coordinate trafficking as it is responsible for the media buy.

Question 2

How do you envision the creative agency working with the AOR to produce the creative so that it is ready to send to the media?

Answer 2

The intent is that the suppliers partner with the Government of Canada to deliver all elements of the ad campaigns. The expectation is that all major planning milestones will be developed together by the Lead Agencies, the AOR and departments. The Lead Agency will have a role in insuring that the media strategy aligns with the creative strategy. Good project management by departments and effective communication will be required so that everyone knows what the delays are.

Question 3

Do you anticipate that the AOR and creative agencies (Lead Agencies) be briefed at the same time so that they work together?

Answer 3

The expectation is that the AOR will take part in strategic planning meetings with departments and Lead Agencies to discuss the overall strategy and the advertising media strategy direction. Departments will be required to prepare two briefs, a creative brief and a media brief, which may or may not be prepared at the same time. The expectation is that the Lead Agency will have an eye on the media brief to ensure that it aligns with the creative strategy.

Question 4

Will the AOR brief the ATP so that they understand all the different elements, or will the ATP be part of the briefing at the initial stage?

Answer 4

It is generally not required that the ATP be part of the briefing at the initial stage as the supplier is not involved in the development of the strategy. The ATP will generally be briefed on technical requirements (e.g. reporting, trafficking) by the AOR and the Program Authority, as required. Should a requirement call for the ATP to be part of an initial briefing (e.g. to discuss technical requirements), the Program Authority will advise.

Question 5

Will the creative agency, now becoming the Lead Agency, have a new/evolved mandate?

Answer 5

Yes. In previous mandates, there was a bilateral arrangement between departments and creative/planning agencies. Now, there will be three players, including the ATP. The expectation is that there will be synergy between all players. As Lead Agency, the creative agency will play a key role, providing overall strategic direction and ensuring creative and media alignment and integration. In this new role, the Lead Agency will provide advice to departments and ensure that the media and creative strategies respond to departmental business objectives. This will be a big change and the transition will require training for all stakeholders.

Question 6

On p. 29 of the RFP, how will the ATP coordinate with the AOR? Does the ATP need to provide the AOR with a self-serve buying account so that it is doing the buying through the ATP's platform or will the ATP manage the platform and buy the media?

Answer 6

The ATP will manage the platforms. The AOR will not require a self-serve buying account. The AOR will develop the media plans including buying and trafficking instructions for the ATP. Media plans will be included with all ATP work authorizations. If any changes are required to media plans, an amended work authorization with a revised media plan will be sent to the ATP. If additional instructions are required at any point in time, the ATP will generally be briefed by the AOR and the Program Authority, as required. As this is a completely new way of doing things for the Government, new procedures will be required to ensure that campaigns are executed seamlessly.

Question 7

Can the ATP use a technology platform licensed through a 3rd party or must it own all technology platforms?

Answer 7

The ATP doesn't have to own all the platforms. ATP services may be provided through a joint venture involving a 3rd party. What is required is that all platforms and collected data reside in Canada. Also, in Part 5 - Certifications, item 5.1.3.7 Computing Infrastructure Capabilities, it is a mandatory requirement that the bidder certifies that the Ad server, the DMP and the DSP are in place.

Question 8

In the RFP, under Basis of Payment, in reference to subcontracted services over \$25,000, the requirement stipulates that three (3) competitive bids be received from outside suppliers. Do these subcontracted services include the purchasing of media space?

Answer 8

No. Media space is not included in this requirement.

Question 9

In reference to ad server fees, could you provide a definition for mid-metrics?

Answer 9

It is impossible to predict what the departments may need or request with respect to mid-metrics; therefore the reference is meant to be somewhat vague. For example, this could include actions or events in a banner triggered on a click or mouse over.

Question 10

About the fixed one-time set-up fee. Can you give us an idea of how many departments will need accounts for the initial set-up?

Answer 10

It is estimated that approximately ten (10) departments will need accounts over the first six (6) months following the award of the ATP contract. This includes departments that will be planning digital ad campaigns during this period. This number is an estimate as the government advertising plan for this period has not yet been confirmed. Accounts for other departments will be added as required, based on government advertising requirements, which are also impossible to determine in advance. The expectation is that the implementation timeframe and process will be defined as part of the initial set-up. As indicated on p. 28, A.1. Overview of Mandate, 2nd paragraph, the mandate includes institutions listed in schedule I, I.1 and II of the Financial Administration Act; however, based on historical practices, approximately 35-40 departments advertise in any give year, which would represent the maximum number of departments that would require accounts. Please note that for each of these accounts, it is estimated that 10-20 stakeholders will require user access.

Question 11

How long is the evaluation process?

Answer 11

The process will depend on how many proposals are received. We will proceed as fast as possible, but our objective is to award the contracts for the AOR and the ATP in June.

Question 12

In the AOR RFP, p. 76, last paragraph under Rated Requirement 6: Key Category, you refer to a "brand account". Can you clarify what is a brand account?

Answer 12

This means any singular account managed for a client.

Question 13

Regarding the DSP and programmatic buys. How do you envision the transition from how digital purchasing is done currently to digital programmatic buys? What do you foresee as the percentage of all digital spend moving to programmatic over the next 3 years?

Answer 13

We have no means of predicting the future with respect to programmatic buys. What can be said is that it will be slower than industry uptake. The Government has started integrating the programmatic space over the past two years, and year-over-year share has slightly increased but remains low. The use of data up to now has been limited, mostly due to current systems and procedures established by the Government. There is currently insufficient data to decide and plan for the future. Privacy and brand safety are important concerns. There are opportunities for improvements, but new processes are required to establish a clear framework on the use of data. A flexible environment is required while retaining

control of actions and data management. The Government has a responsibility to ensure that advertising data is collected, used, stored and disposed of in manners consistent with Canadian privacy regulations and industry best practices. This is one of the reasons why the Government requires the services of an ATP. Part of the objectives is to establish new systems and procedures that will enable the Government to further explore the use of the programmatic space in a well-defined environment.

Question 14

In the AOR RFP, p. 36, Roles and responsibilities of the AOR, can you provide a definition of message management services?

Answer 14

Right now, the Government deals with multiple planning/creative agencies to plan all the campaigns. It is critical to look at all campaigns as a whole to better decide when each message or campaign should be in market to ensure that saturation is reduced and that the danger of competing messaging is kept to a minimum. Now that planning will reside with the AOR, there is an opportunity for this supplier to provide information, guidance and advice on individual campaign schedules and overall messaging for the Government at the media planning stage. This would also apply to complimentary campaign messaging in the various media.

ALL OTHER CLAUSES AND CONDITIONS OF THIS REQUEST FOR PROPOSAL REMAIN UNCHANGED