



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

Giulia Brad
giulia.brad@tpsgc-pwgsc.gc.ca

**LETTER OF INTEREST
LETTRE D'INTÉRÊT**

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 RFI AOR ATP	
Solicitation No. - N° de l'invitation EP361-190010/A	Date 2018-05-24
Client Reference No. - N° de référence du client EP361-19-0010	GETS Ref. No. - N° de réf. de SEAG PW-\$\$CZ-025-74897
File No. - N° de dossier cz025.EP361-190010	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-06-26	
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: Brad, Giulia	Buyer Id - Id de l'acheteur cz025
Telephone No. - N° de téléphone (613) 990-3814 ()	FAX No. - N° de FAX (613) 949-1281
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA 4TH FL. 350 ALBERT ST. Attn: Steve Chapman Office 037 OTTAWA Ontario K1A0S5 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée See Herein	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

Government of Canada Advertising – Media Planning, Buying, Reporting and Verification

1. Purpose of this Request for Information (RFI):

This RFI is aimed at the Canadian advertising industry and associations, advertising agencies, advertising technology providers and certified ad placement verification suppliers ("Industry"). The purpose is to seek information on approaches to address current and evolving challenges presented by the changing advertising environment, to help the Government of Canada (GC) with the development of the next Agency of Record (AOR) and Advertising Technology Provider (ATP) mandates (i.e. contracts).

2. Nature of Request for Information

This is a RFI and not a bid solicitation. This RFI will not result in the award of any contract. The issuance of this RFI is not to be considered in any way a commitment by the GC, nor as authority to potential respondents to undertake any work that could be charged to Canada. Suppliers of any services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI.

Participation in this RFI is encouraged, but is not mandatory. There will be no short-listing of potential suppliers for the purposes of undertaking any future work as a result of this RFI. Similarly, participation in this RFI is not a condition or prerequisite for the participation in any potential subsequent solicitation.

The procurement of any of the services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to solicit feedback from Industry with respect to the matters described in this RFI.

3. Nature and Format of Responses Requested

Respondents are requested to provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this RFI could be satisfied. Respondents should explain any assumptions they make in their responses.

Background on GC advertising practices and the media management model related to the requirements or objectives described in this RFI is provided in **Annex A**.

A response template in the requested format is provided in **Annex B**.

4. Response Costs

Canada will not reimburse any respondent for expenses incurred in responding to this RFI.

5. Treatment of Responses

- a) **Use of Responses:** Responses will not be formally evaluated. The written comments received by Canada will not be specifically shared or referred to in any potential solicitation document and any comments provided as a result of this RFI should not contain any restrictions of use. Canada acknowledges that any information collected will be utilized by Canada in an anonymous fashion.
- b) **Review Team:** A review team composed of representatives of Canada will review the responses. Canada reserves the right to hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.

- c) **Confidentiality:** Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the Access to Information Act.
- d) **Follow-up Activity:** Canada may, in its discretion, contact any respondents to follow up with additional questions or for clarification of any aspect of a response.

6. Contents of this RFI

This RFI is broken down in two parts:

The first part explains the purpose, the terms and conditions and instructions on how to respond.

The second part includes two annexes:

Annex A – Provides background information on GC advertising practices and the current structure and challenges subject to this RFI on which Industry feedback is being solicited.

Annex B – Provides a response template.

7. Format of Responses

Responses should be submitted in accordance with the template provided in Annex B.

8. Enquiries and submission of responses

This is not a bid solicitation. Accordingly, Canada will not respond to enquiries in writing or by circulating answers to all potential suppliers. Potential suppliers are not required to submit information under this RFI to qualify for any future bid solicitations for this requirement. Documents may be submitted in either official language of Canada.

Respondents must submit their responses and questions via email to giulia.brad@tpsgc-pwgsc.gc.ca.

Responses submitted through other channels may not be accepted.

9. Industry Consultation

Canada may follow up this RFI with one-on-one meetings or other follow-on activities with Industry in order to obtain more information and discuss any aspect of this requirement.

One-on-one meetings, if required, will be scheduled by the Advertising Coordination and Partnerships Directorate (ACPD).

Any and all expenses incurred by the Industry in participating in this Industry Consultation, including the provision of information and potential travel and living expenses, are at the Industry's sole risk and expense.

Participation (or the inability to participate) in the Industry Consultation will not preclude a supplier from participating in any future consultation and/or future solicitation relating to this requirement.

Annex A – Background and Objectives

For ease of reference, this Annex is broken down under the following main sections:

- **Background**
- **Intended Outcomes**
- **Challenges**

A-1 Background:

Advertising is an important way for the GC to communicate with Canadians about policies, programs, services, rights, responsibilities and protections. GC advertising is aimed at national, regional, rural and community-based audiences within Canada, of all ages and origins, including official language minority communities, and ethnic and Indigenous communities. The GC must run ads in both official languages as required by the *Policy on Communications and Federal Identity* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683>), the *Directive on the Management of Communications* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682>) and the *Official Languages Act* (OLA). Ads are also placed in other languages, as required. A limited number of campaigns are directed to international audiences.

The GC advertising management framework involves many organizations. Rigorous annual planning and reporting mechanisms are included, which are designed to ensure that activities align with government priorities, meet the communications needs of Canadians, comply with applicable legislations and regulations, and provide best value for money. GC advertising is coordinated centrally through the Privy Council Office and Public Services and Procurement Canada (PSPC); however, federal institutions are responsible for the day-to-day management of their activities, and are accountable for performance measurement and resulting on results.

For more information on roles and responsibilities of organizations involved in managing GC advertising, consult the following: <http://www.tpsgc-pwgsc.gc.ca/pub-adv/roles-eng.html>.

For more information on the GC advertising management framework consult *Annex B: Mandatory Procedures for Advertising*, in the *Directive on the Management of Communications*: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682§ion=procedure&p=B>

Many GC advertising initiatives can be in development at the same time – typically with little planning time, generally concentrated in the third quarter of the fiscal year (October – December), and principally the fourth quarter (January – March). There are multiple levels of approvals, these can vary from one institution to another and impact on media planning and buying execution timelines. Numerous revisions to media plans may be requested with short lead times, rapid response is required, possibly outside normal business hours, and no rush or overtime charges are applicable.

Over the past 10 years, total net media spending has been as high as \$136 million in 2009-2010, but has dropped to \$30.6M (net) since 2015-2016. Following the General Elections in October 2015, the total advertising budget (production and media) has been \$40M per year (net). In 2016-2017, for the first time in history, more than 50% of the total media budget was spent on digital media (55%, \$16.8M net); of this amount, 42% was spent on social media, 45% on display and RTB, and 13% on search engine marketing. Estimated spending in 2017-2018 indicates that this trend is continuing. GC advertising budgets are approved annually and are generally confirmed in the first quarter of the fiscal year (April – June). Budgets are approved by fiscal year and cannot be carried over if planning or approvals take longer than anticipated.

For more details on GC advertising activities consult annual reports on GC advertising activities: <http://www.tpsgc-pwgsc.gc.ca/pub-adv/annuel-annual-eng.html>

Media planning, buying, reporting and verification services subject to this RFI are provided through an Agency of Record (AOR) and an Advertising Technology Provider (ATP). The AOR and the ATP are the sole authorities mandated by the GC to provide centralized services to approximately 35 federal institutions (of the 105 listed in schedules I, I.1 and II of the *Financial Administration Act*).

The AOR and ATP mandates are currently structured as follows:

- AOR – Provides project-based media planning and buying services upon request for both digital and traditional media. Lead Agencies are responsible for overall strategic oversight and creative production. Lead Agencies and the AOR are required to work closely together. The AOR is also required to work closely with the ATP, providing advertising technology services (see below). All communications with institutions on media planning, buying and reporting is managed through the AOR.
- ATP – Provides project-based advertising technology services upon request for digital media. These services include ad server, Demand Side Platform (DSP) and Data Management Platform (DMP) services. The ATP mandate was established to strengthen reporting capacity, data oversight, accountability and transparency. The purpose of the DMP was and remains to aggregate, store and facilitate online access to GC digital advertising data and reports for the AOR and institutions managing digital campaigns. The ATP is required to work closely with the AOR to ensure tracking and reporting on ad delivery and performance.
- AOR and ATP – Both also provide corporate and other related services to the GC.

The AOR and ATP contracts are both managed by the Advertising Coordination and Partnerships Directorate (ACPD) at PSPC. ACPD manages AOR and ATP ongoing corporate services and other related services upon request, oversees overall delivery of services to federal institutions, based on the terms and conditions of the contracts, and ensures services respond to the GC's evolving needs.

For more information on GC advertising services procurement consult the following: <http://www.tpsgc-pwgsc.gc.ca/pub-adv/ac-ar-eng.html>.

The increased reliance on digital media, today's media landscape, and evolving GC advertising practices and needs, present some important new challenges. The AOR and ATP operational structure implemented in 2015 involved substantial changes that provided a strong foundation; however, today's environment calls for the need to review and improve this model sooner than anticipated (i.e. before the end of the maximum contract period of five years). The GC is seeking to build a solid and sustainable *media management model* for GC advertising that will ensure most efficient planning, buying, reporting and independent verification of ad delivery and performance. To achieve this, a review process has been initiated by PSPC, including a series of consultations. This work will be underway over the next few months. This RFI is an important part of these activities. The outcome of the review process will support the next AOR and ATP procurement process in 2019.

A-2 Intended Outcomes of the RFI:

- The structure of the next AOR and ATP mandates and media management model, providing media planning, buying, reporting and verification services, is designed in a way that can sustain GC advertising evolving needs and legislative developments, allows for continuous improvement and can adapt to technological change.

- Federal institutions have access to modern tools and capabilities to monitor and report on the delivery and performance of their digital advertising activities.
- The structure of AOR and ATP mandates and media management model support timely, cost-effective, accountable and transparent execution of GC advertising activities.
- The AOR and ATP mandates and media management model conform to leading Industry best practices.
- Digital ad delivery and performance can be independently verified to ensure best value and that planned objectives are met.

A-3 Challenges:

The following outlines the challenges on which your feedback is being solicited through this RFI. Related questions are also indicated for ease of reference. To facilitate the review of responses, a response template is provided in Annex B. Please use this template to prepare and submit your response. You may provide additional feedback on related matters above and beyond the questions identified if deemed relevant for the purposes of this RFI.

Thank you for your collaboration in this important process.

Challenge 1. Digital ad verification:

Context – Given the increasing use and dependence on digital media (including many walled gardens), there is a requirement for a methodology and process to independently verify digital ad placements and performance. The implementation of the *General Data Protection Regulation* (GDPR) by the European Union is also making this more challenging, providing large-scale publishers with a basis to justify disallowing third-party ad server tracking as a means for advertisers to verify ad delivery and performance:

1a. How should or could the GC best fulfill this requirement?

Challenge 2. Digital reporting:

Context – Given the increasing use of walled gardens and self-serve platforms, reporting can involve many data sources, each with their own rules, metrics and technical requirements, making reporting more challenging. There is a requirement for a platform and process to centralize reports on ad delivery and performance to facilitate campaign monitoring, optimization and reporting by all stakeholders:

2a. How should or could the GC best fulfill this requirement?

Challenge 3. Media planning and buying:

Context – The AOR is required to provide both ongoing corporate services and project-based services upon request. Workload can fluctuate substantially throughout the year, urgent requests can occur frequently with little to no advance notice; however, the AOR is required to provide high service levels at all times:

3a. How should the GC structure these services requirements to address these cyclical business volumes while achieving expected outcomes most effectively?

Context – The increasing volume in GC digital media spending and evolving digital media segmentation bring up the question of whether the current AOR structure is best suited to ensure optimal effectiveness and efficiency in today's environment:

3b. Should the GC consider having more than one AOR to provide more specialized services, e.g. traditional and digital display, programmatic, social, search engine marketing? Either way, please explain why.

Context – Consolidating media planning and buying under the AOR streamlined media planning and buying as intended; however, this created a new challenge for federal institutions now having to manage two contracts and relationships with and between different suppliers for media planning (AOR) and creative production (Lead Agencies). * Note: Question 7a) also pertains to supplier-client relationships.

3c. For optimal overall effectiveness and efficiency of GC advertising, should media planning and buying be consolidated with an AOR or split-up with creative agencies handling media planning and creative and the AOR strictly handling media buying?

Context – The GC requires brand safety tools and processes for all digital placements. These are developed and implemented by the AOR and the ATP based on GC requirements and include mechanisms such as white lists, exclusion lists, technology solutions, etc. The criteria is as broad as possible since media selection is the responsibility of federal institutions.

3d. What would be the best way for the GC to ensure optimal brand safety in today's digital environment?

Context – An important part of GC digital advertising is conducted on social media platforms and a number of tactics are used (e.g. Facebook, Instagram, Twitter, LinkedIn, Snapchat), with new platforms continuously emerging. Most paid activities are managed through the AOR, however a portion is managed by federal institutions who make direct purchases. A variety of platforms are used, by different stakeholders, to manage these campaigns. Social media advertising through the AOR is managed separately. The AOR doesn't have access to organic social media activities and related analytics. The AOR is required to manage and report on activities under its responsibility, as well as ensure best value and effectiveness.

3e. For optimal overall effectiveness and efficiency of GC advertising, what would be the best way for the GC to manage overall advertising activities on social media platforms?

Challenge 4. Privacy:

Context – GC advertising processes must account for privacy and this can entail unique requirements to comply with GC policy requirements, governed by the Privacy Act. The upcoming implementation of the GDPR brings up some questions also affecting all organizations dealing with European countries or citizens on Internet. While GC advertising is mostly in Canada, international advertising is not excluded. The GC generally requires proactive measures under such circumstances.

4a. Can you please describe how your business is handling privacy obligations in today's environment and how you would tailor your business processes to meet client requirements?

Challenge 5. Remuneration:

Context – The remuneration structure of suppliers providing advertising services to the GC must provide best value for Canadians, be fair, transparent and accountable. The GC also requires that services be remunerated upon satisfactory completion of the work, substantiated with supporting documentation.

5a. What would be the most appropriate means for the GC to remunerate the services below?

Note – Since the scope of the services can impact on remuneration, please specify key activities; for example, Services: Media buying / Digital Media; Key activities: media negotiation, booking, campaign setup, testing, quality control, trafficking, monitoring, optimization, reporting, consolidation, verification, billing, etc.; Remuneration: % fees, hourly fees, etc. Account for all costs, including one-time setup fees or maintenance fees, as appropriate. Add or remove service categories if needed.

Services	Key activities	Remuneration
Ongoing		
Corporate		
As required		
Media planning / Traditional		
Media planning / Digital		
Media buying / Traditional		
Media buying / Digital		
Media buying / Digital / Agency Trading Desk		
DSP		
DMP		
Digital ad verification		
Add or remove service categories as required		

5b. Should the GC consider performance-based remuneration incentives? If so, please explain what form this could or should take.**Challenge 6. Performance evaluation:**

Context – Performance evaluation is included in both the AOR and ATP mandates. The scope of these evaluations is generally determined by PSPC over the first half of the mandates. Outcomes should contribute to continuous learning, service improvements and strengthened relationships.

6a. What mechanisms or metrics should the GC consider to evaluate performance and ensure ongoing optimal performance throughout the mandates?

Note – Since approaches can vary depending on the nature of the service offering, please specify what type of services your response pertains to.

Challenge 7. Supplier-client relationships:

Context – Many suppliers and organizations are involved in the execution of GC advertising campaigns. Managing communications and relationships and ensuring seamless campaign execution can be challenging when suppliers are also competitors outside the GC advertising context. * Note: Question 3c) also pertains to supplier-client relationships.

7a. How could or should the GC best manage this challenge?

Challenge 8. General Comments:

8a. Do you have any other comments or recommendations relating to this requirement?

Additional Question: Social Procurement

As per the PSPC Minister's mandate letter, PSPC is expected to develop "initiatives to increase the diversity of bidders on government contracts, in particular businesses owned or led by Canadians from under-represented groups, such as women, Indigenous Peoples, persons with disabilities, and visible minorities, and take measures to increase the accessibility of the procurement system to such groups while working to increase the capacity of these groups to participate in the system".

PSPC intends to implement a social procurement approach to leverage the government's buying power through procurement to support socio-economic objectives and to generate positive societal impacts.

Social enterprise

A social enterprise is currently defined as an enterprise that seeks to achieve social, cultural or environmental aims through the sale of goods and services in which the majority of net profits must be directed to a social objective (e.g., reducing environmental impacts of its products or including local training in the community).

Diverse supplier

A diverse supplier is currently defined as a business owned or led by Canadians from underrepresented groups, such as women, Indigenous Peoples, persons with disabilities and visible minorities. Each business is usually defined as being owned, operated and controlled by 51% of a given group (e.g., women-owned business, Indigenous-owned business, persons with disabilities-owned business, or visible minority-owned business).

PSPC is considering various models to confirm that a supplier meets the definition of a diverse supplier.

One option is that suppliers self-certify with an attestation, which would be verified by PSPC through audits throughout the life of the contract. A second option is to make use of third-party organizations which verify that suppliers meet the diverse supplier definition and provide a certification for a fee. To our knowledge, the following organizations provide such certification:

- <https://www.buysocialcanada.com/suppliers>
- Canadian Aboriginal and Minority Supplier Council
- WBE Canada, Certified Women Business Enterprises
- Canadian Council for Aboriginal Business
- Inclusive Workplace Supply Council of Canada
- Social Purchasing Project (for social purpose enterprises)

AQ a. Could you recommend approaches for incorporating social procurement measures in any future bid solicitation? For example, one approach could be to include a rated criterion in the RFP to award 5-15% of the total technical score to diverse suppliers.

AQ b. Are you aware of any other organizations, besides those listed above, that certify diverse suppliers or social enterprises?

AQ c. Certification bodies typically charge a fee to certify a business as a diverse supplier or social enterprise. Are you willing to pay an extra fee to be certified? Do you think it is fair or creates a barrier for your entry?

AQ d. Should PSPC use attestation (self-certification) followed by audits, or certification by established certification organizations to qualify diverse suppliers and social enterprises? What other methods would you propose we use to verify diverse suppliers?

AQ e. Do you anticipate that the GC's commitment to increasing the diversity of businesses owned or led by Canadians from underrepresented groups will have an impact on your participation in any future procurement?

Annex B – RFI Instructions and Response Template

(This document is also available in MS Word format)

1. INSTRUCTIONS

Response submission instructions

Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the Access to Information Act. Responses and questions regarding this RFI should be submitted directly to Giulia Brad at giulia.brad@pwgsc-tpsgc.gc.ca.

Respondents are requested to respond to the questions at Annex A, **using the response template provided in Annex B, Section 2 “Response Template” (see below)**. Any additional comments and concerns they may have can be answered under Question 9a.

Format

There is no page limit on the information to be provided. Suppliers should submit their responses electronically in either Microsoft Word or Adobe PDF format.

Deadline

The GC will review all submissions received by date and time indicated on page 1 of the RFI.

2. RESPONSE TEMPLATE

The response template is provided below:

- 1) Please fill in your contact information and respond to the questions. There is no space limit for each answer.
- 2) When completed, please submit the completed response template to the email address identified in section 8 of the RFI (page 2).

Respondent: [Insert Organization's name]

Contact Information

Name of representative: [Insert Name]

Email: [Insert Email]

Telephone number: [Insert Phone]

Challenge 1. Digital ad verification:

1a. How should or could the GC best fulfill this requirement?

[Insert Response]

Challenge 2. Digital reporting:

2a. How should or could the GC best fulfill this requirement?

[Insert Response]

Challenge 3. Media planning and buying:

3a. How should the GC structure these services requirements to address these cyclical business volumes while achieving expected outcomes most effectively?

[Insert Response]

3b. Should the GC consider having more than one AOR to provide more specialized services, e.g. traditional and digital display, programmatic, social, SEM? Either way, please explain why.

[Insert Response]

3c. For optimal overall effectiveness and efficiency of GC advertising, should media planning and buying be consolidated with an AOR or split-up with creative agencies handling media planning and creative and the AOR strictly handling media buying?

[Insert Response]

3d. What would be the best way for the GC to ensure optimal brand safety in today's digital environment?

[Insert Response]

3e. For optimal overall effectiveness and efficiency of GC advertising, what would be the best way for the GC to manage advertising activities on social media platforms?

[Insert Response]

Challenge 4. Privacy:

4a. Can you please describe how your business is handling privacy obligations in today's environment and how you would tailor your business processes to meet client requirements?

[Insert Response]

Challenge 5. Remuneration:

5a. What would be the most appropriate means for the GC to remunerate the services below?

Services	Key activities	Remuneration
Ongoing		
Corporate		
As required		
Media planning / Traditional		
Media planning / Digital		
Media buying / Traditional		
Media buying / Digital		
Media buying / Digital / Agency Trading Desk		
DSP		
DMP		
Digital ad verification		
Add or remove service categories as required		

5b. Should the GC consider performance-based remuneration incentives? If so, please explain what form this could or should take.

[Insert Response]

Challenge 6. Performance evaluation:

6a. What mechanisms or metrics should the GC consider to evaluate performance and ensure ongoing optimal performance?

[Insert Response]

Challenge 7. Supplier-client relationships:

7a. How could or should the GC best manage this challenge?

[Insert Response]

Challenge 8. General Comments:

8a. Do you have any other comments or recommendations on the overall requirement?

[Insert Response]

Additional Question: Social Procurement:

AQ a. Could you recommend approaches for incorporating social procurement measures in any future bid solicitation? For example, one approach could be to include a rated criterion in the RFP to award 5-15% of the total technical score to diverse suppliers.

[Insert Response]

AQ b. Are you aware of any other organizations, besides those listed above, that certify diverse suppliers or social enterprises?

[Insert Response]

AQ c. Certification bodies typically charge a fee to certify a business as a diverse supplier or social enterprise. Are you willing to pay an extra fee to be certified? Do you think it is fair or creates a barrier for your entry?

[Insert Response]

AQ d. Should PSPC use attestation (self-certification) followed by audits, or certification by established certification organizations to qualify diverse suppliers and social enterprises? What other methods would you propose we use to verify diverse suppliers?

[Insert Response]

AQ e. Do you anticipate that the GC's commitment to increasing the diversity of businesses owned or led by Canadians from underrepresented groups will have an impact on your participation in any future procurement?

[Insert Response]