



REQUEST FOR PROPOSALS

Joint Marketing Program Review & Research

The Yukon Historical & Museums Association (YHMA) is requesting proposals to undertake a review of the current Joint Marketing Program and complete an environmental scan. Interested parties are asked to submit proposals by e-mail only.

Please direct all questions regarding the RFP to:

Lianne Maitland, YHMA Executive Director: info@heritageyukon.ca

Please reference 'Joint Marketing Program RFP' in your subject line, and send formal submissions to:

Lianne Maitland, YHMA Executive Director: info@heritageyukon.ca

The deadline for receipt of proposals is January 8, 2016 at midnight PST.

Qualifying proposals will be evaluated by YHMA based on a combination of methodology, qualifications, experience, and price. YHMA reserves the right not to accept the lowest price or any proposal as submitted.

Proposed Project Start Date: January 16, 2017

Project Completion Date: March 17, 2017

Price Ceiling: \$20,000.00 (excl. GST)

Background

The YHMA administers a joint marketing program for heritage organizations. This work is undertaken in collaboration with the YHMA's Joint Marketing Committee whose members contribute financially to the program.

Our Marketing Plan is coming to the end of its shelf life and needs an update. We want to expand our cooperative marketing activities in order to adopt a more dynamic, innovative, year-round, and active cooperative marketing program. We have identified several opportunities to enhance existing marketing activities through conversations with our Joint Marketing partners.

In preparation for a renewed program, we wish to conduct a review of the current structure, objectives, activities, and branding. We also need an environmental scan, including stakeholder interviews, a literature review, and research on other tourism and/or culture sector joint-marketing and co-branding initiatives. This review will inform a revision of the Joint Marketing Program and the creation of an updated Marketing Plan by identifying current/emerging trends and issues, strengths and weaknesses, opportunities, and potential areas of focus.

About YHMA

YHMA was established in 1977 by a group of concerned and passionate individuals to create a united voice for understanding and promoting heritage and history in the Yukon. We keep apprised of issues and advocate for the Yukon's heritage and heritage sector.

We continue to build a learning environment for history and culture and the development of skills and best practices in the heritage sector. We share knowledge with the Yukon heritage community and support each other in protection and conservation projects. Most of our activities are collaborations and partnerships. Many of our events and programs honour those in the heritage sector who are dedicated to our vision.

YHMA is a territorially-incorporated Society and a registered charitable organization.

Our membership reflects the scope and diversity of the Yukon heritage community. Our institutional members include museums, First Nation cultural centres, historical societies, art galleries, archives, historic sites, science centres, zoos and nature reserves. Our individual members include museum employees, contractors and consultants, Board members and volunteers, and others actively involved in the heritage sector or who have an interest in heritage.

Mission: The YHMA will inspire and share a passion for Yukon heritage by providing opportunities and support for education, networking, advocacy, partnerships, and awareness.

Project Objectives

To develop a report that will inform a revision of the Joint Marketing Program and the creation of an updated Marketing Plan through:

- An environmental scan, including interviews with key stakeholders and a review of relevant background literature regarding the tourism and heritage sectors;
- Research on other tourism and/or culture sector joint-marketing or co-branding programs, including multi-attraction pass program models; and
- A critical review of the current Joint Marketing Program structure, objectives, activities, and branding against current trends, best practices, and stakeholder needs.

Responsibilities of Proponent

- Meet regularly with the YHMA Executive Director, through phone calls and in person, for direction and to review ongoing progress of the work;
- Review documents and records related to the history, structure, objectives, activities, and branding of the Joint Marketing Program; and other relevant documents as appropriate;
- Review documents and records regarding marketing, audience research, and related statistics in the tourism and heritage sectors at a territorial, national, and/or international level as appropriate;
- Research and review other tourism and/or culture sector joint marketing or co-branding programs, with a particular focus on multi-attraction pass program models and funding mechanisms;
- Develop an interview guide that covers key information YHMA will need to assess the current environment, including but not limited to: stakeholder priorities, emerging trends and issues, key strengths and weaknesses of YHMA/Joint Marketing, and potential areas of focus;
- Set up meetings with the following key stakeholders: YHMA Joint Marketing members; Yukon Government (YG) Historic Sites Unit; YG Industry Services Unit; Yukon Arts Centre; Yukon First Nations Culture and Tourism Association; Tourism Industry Association of Yukon; and others as deemed fit;
- Interview key stakeholders via the following priority order: in person, via Skype or a comparable program, or by phone;
- Provide documented reports of each meeting; and
- Provide a final report as outlined under Deliverables below.

Responsibilities of YHMA

- Meet regularly with the proponent to provide timely direction and review of the ongoing progress of the work;
- Provide list of stakeholders for interviews;
- Work with proponent to identify key issues for developing interview guide; and
- Attend stakeholder meetings as arranged by the proponent whenever possible, as required.

Deliverables

The proponent will provide a report on the results of the environmental scan and research, including:

- Summary results of stakeholder interviews, including concerns and priorities;
- An analysis of stakeholder interview and literature review data identifying trends, opportunities, and potential areas of focus;
- A summary of other tourism and/or culture sector joint marketing and co-branding programs and their approximate budgets;
- A critical review of the current Joint Marketing Program structure, objectives, activities, and branding against current trends, best practices, and stakeholder priorities;
- Copies of meeting and interview notes or recordings;
- A copy of the stakeholder interview guide;
- A list of resources for the literature review;
- A list of contacts for the stakeholder interviews;
- A list of contacts for the tourism/culture joint marketing and co-branding programs; and
- A summary report of the interviews suitable for sending to interviewees.

The proponent will submit all materials as a printed document as well as complete MS Word and PDF files on a USB drive.

Criteria for Proposal

The proposal body should be a maximum of four (4) pages, excluding cover page, team member CVs, and any other supporting documents, which should be presented in an appendix. Proposals should include the following:

- A description of the proponent's overall methodology for conducting the work;
- A draft work plan including tasks, team members conducting each task, and timetable;
- A demonstration of the proponent's technical ability and experience related to the achievement of the project objectives, including but not limited to:
 - Familiarity with the non-profit, tourism, culture, and/or heritage sectors;
 - Experience writing interview guides and conducting interviews; and
 - The CVs, including professional qualifications, of all team members;
- A proposed budget including details of all cost categories and corresponding costs, including rates for all professional services and disbursements, to a maximum of \$20,000.00 before GST;
- Contact information for client references; and
- A suggested payment schedule.