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YORK REGION TRANSIT MARKETING AND COMMUNICATIONS CONSULTANT

The Transit Committee recommends the adoption of the recommendations contained in the following report, January 5, 2004, from the Commissioner of Transportation and Works:

1. RECOMMENDATIONS

It is recommended that:

1. Regional Council award the marketing and communications services assignment for York Region Transit to Gee Jeffery & Partners for an initial one year term at a cost of \$305,814 as outlined in this report, and two additional one year terms subject to successful negotiations.
2. The Commissioner of Transportation and Works be authorized to award additional work to Gee Jeffery & Partners, subject to successful negotiations with an upset limit of \$250,000, for the execution of the marketing strategies developed in the 2004/05 York Region Transit Marketing & Communications Plan.
3. The Director of Supplies and Services be authorized to issue a purchase order to Gee Jeffery & Partners for an initial one year term beginning February 15, 2004 in the amount of \$305,814 and two additional one year terms subject to successful negotiations.
4. The Regional Solicitor be authorized to prepare the necessary agreement.
5. The Regional Chair and Clerk be authorized to execute the agreement on behalf of the Region.

2. PURPOSE

The purpose of this report is to seek approval from Transit Committee and Regional Council to award the York Region Transit (YRT) marketing and communications contract to Gee Jeffery & Partners. This contract is for one year with the option to renew for two additional one year terms.

3. BACKGROUND

The transportation landscape of the York Region has undergone considerable change over the past few years. In a very short time, transit in York Region has progressed from being 'the local bus' to a comprehensive regional transit system offering a family of transit services.

As a part of the amalgamation of transit services in York Region, a two year (2002-2003) marketing and communications plan was developed to introduce the new YRT brand, programs and strategies. YRT retained Interkom Creative Marketing to assist with the development of the plan, the creative development and the printing of many of the marketing strategies outlined in the plan. Since that time, YRT has successfully launched the brand, introduced customer communication materials (route map, schedules, newsletters, etc), developed a Web site and carried out other related activities. The Interkom contract for marketing and communication services ends on February 15, 2003.

4. ANALYSIS AND OPTIONS

Given the accelerated rate of growth, as well as the future introduction of rapid transit to the family of transit services, YRT is at a critical point in its development where it is necessary to audit and assess the marketing and communication goals and objectives, measure success and identify areas of improvement, and review the positioning for the family of transit services available in the Region.

In order to continue to be successful and meet the growing and changing needs, a new and innovative marketing and communications plan is required for 2004/05. On November 17, 2003, a Request for Proposals (RFP) for assistance with the development of a new marketing and communications plan was issued. Some of the key elements of the RFP included:

- Update of the YRT Route Maps and Schedules.
- Assistance with the customer newsletters (conventional & Mobility Plus).
- A new YRT marketing and communication plan for 2004/05.

Following the completion of the marketing and communications plan (May 2004), assistance will also be required for the creative, design and implementation of the new strategies contained within the plan for 2004. It is recommended that YRT continue utilizing Gee Jeffery for this work in order to ensure continuity in the execution of our marketing strategies and programs. The cost for this assistance is approximately \$250,000 and has been included as a part of the draft 2004 Transit Business Plan and Budget.

The Request for Proposals closed on Friday November 28, 2003. The following five (5) companies submitted proposals for the project:

- ADCOM Advertising and Design
- Gee Jeffery & Partners
- Interkom Creative Marketing
- Kenneth Caplan and Associates
- Lenmark Communications Group

4.1 Evaluation Process

Representatives from the Supplies and Services branch, York Region Transit and York Consortium 2002 evaluated the proposals in a three-phase process:

<u>Phase</u>	<u>Weighting</u>
• Phase One - An evaluation of the technical proposal	50%
• Phase Two - Interview/ Presentation	30%
• Phase Three – Financial	<u>20%</u>
	100%

The objective of the evaluation process was to determine which proposal provides the best overall value to the Region. Only those proponents who achieved 70% during phase one were invited to continue onto phase two.

Following phase one, two (2) proponents who achieved a 70% rating were chosen to proceed to phase two interviews as follows:

- Gee Jeffery & Partners
- Interkom Creative Marketing

A third proponent Adcom achieved a 70% rating, however, due to their failure to meet the terms of the RFP, their proposal was rejected by the Bid Review Committee.

The final phase was the opening of the financial proposals from the two remaining firms. In analysis of the pricing submitted by Interkom Creative Marketing, it was determined that a clarification of their financial proposal was required. To address this, a series of yes or no related questions were e-mailed to Interkom Creative Marketing. The response confirmed that pricing failed to account for the estimated need for services during the term of the contract. As a result, the scoring reflects the corrected pricing for Interkom of \$204,780.50 and is based on the estimated services required during the term of the contract.

The financial evaluation also indicated that required research was included in the pricing received from Gee Jeffery and was not included in the pricing received from Interkom. The cost for this research is not included in the corrected pricing for Interkom and therefore additional costs over and above \$204,780.50 would be incurred to meet our research needs.

The evaluation of the proponents is summarized below:

Table 1
Evaluation Results Summary

Proponent	Phase 1 Score Technical Submission (50%)	Phase 2 Score Interviews (30%)	Financial Score (20%)	Final Rating (100%)
Gee Jeffery	45.4	28.9	13.4	87.6
Interkom	35.3	11.4	20	66.7

Based on the final overall rating, Gee Jeffery has been selected to assist YRT with the marketing and communication needs for 2004. Throughout the evaluation process Gee Jeffery has successfully demonstrated that they possess the top qualifications, experience and resources required in meeting the needs of the project. They have further shown that they have a clear understanding of the project requirements and will offer a quality approach to achieving the goals and objectives.

It should be noted that Gee Jeffery has also been retained by the York Consortium to develop the brand identity and marketing and communications strategy for rapid transit in York Region. Given that Gee Jeffery will assist both teams, it will provide the added benefit ensuring a unified brand message is created and communicated to the public. Rapid transit and conventional transit services are elements of a comprehensive 'system' and must be integrated to the fullest extent possible.

4.2 Relationship to Vision 2026

As a part of Vision 2026, York Region has identified the need to improve transportation opportunities for residents and businesses in the Region. YRT is crucial for sustaining the healthy and vibrant environment required to meet business and residential growth in one of Canada's fastest growing communities.

5. FINANCIAL IMPLICATIONS

The project is to be awarded to Gee Jeffery at a cost of \$305,814 including applicable taxes for the one year term. The contract with Gee Jeffery will be effective February 15, 2004 to coincide with the completion of the current contract with Interkom for marketing and communications.

To ensure continuity in the execution of our marketing programs, it is recommended that YRT continue to utilize Gee Jeffery for assistance with the creative, design and printing of the strategies developed as a part of the 2004/05 marketing and communications plan. This work is outside of the pricing in the RFP, given that the marketing and communication strategies and associated costs have not been developed at this time. These costs for this work of approximately \$250,000 has been included as part of the draft 2004 Business Plan and Budget.

Given that both YRT and the York Consortium are utilizing the same consultant, cost savings can be realized for this project as well as the future implementation of many of the strategies that will be developed as part of the plan.

6. LOCAL MUNICIPAL IMPACT

The York Region Transit 2004/05 Marketing and Communications Plan will assist in furthering the transportation goals of the area municipalities, particularly in increasing public transit's market share. Most of the marketing strategies will be system-wide, thus their effects will be felt across the entire Region.

7. CONCLUSION

Given the tremendous growth and change in the Region, it is an appropriate time to re-examine strategies and target marketing dollars to meet the needs of the public. An effective marketing and communications plan will ensure that the benefits of public transit are effectively communicated, and demonstrate to the public that YRT is striving to achieve established revenue and ridership goals as a family of transit services. It is therefore recommended that Gee Jeffery be retained to assist staff with the development of a marketing and communications plan for 2004/05, as well as the creative and printing of the associated strategies developed as a part of the plan.

The Senior Management Group has reviewed this report.