

Request for Proposal
Work Wellness Institute Marketing

Issue date: January 16, 2023

Closing Time: Proposals to be received **before 5:00 PM (PST)** on: January 24, 2023

DELIVERY OF PROPOSALS:

Proposals must be in English and submitted via email or hardcopy. Proposals submitted by email are to be submitted to rfpsubmissions@workwellnessinstitute.org in accordance with the instructions at Section 2.3 of this RFP.

Proposals must be received before Closing Time to be considered.

CONFIRMATION OF PROPONENT'S INTENT TO BE BOUND:

The enclosed proposal is submitted in response to the referenced Request for Proposal, including any Addenda. By submitting a proposal, the Proponent agrees to all of the terms and conditions of the RFP including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposal;
- b) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the proposal; and
- c) The Proponent agrees to be bound by the statements and representations made in its proposal.

Work Wellness Institute Contact: Enquiries related to this RFP, including any requests for information or clarification may only be directed in writing to the following person who will respond if time permits before the Closing Time. Information obtained from any other source is not official and should not be relied upon.

Kamilla Karoli, VP Business Operations
kkaroli@workwellnessinstitute.org

The cut-off for submitting any questions related to this RFP will be **48 hours** before the Closing Time. Questions received after this time may not be answered.

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1 SUMMARY OF THE OPPORTUNITY

The Work Wellness Institute is providing an opportunity for a marketing professional to collaborate with us to meet and expand our organizational marketing activities. The candidate we are searching for must have demonstrated experience in a variety of marketing initiatives including by not limited to: design, development, management and implementation of effective marketing campaigns inclusive of social media; membership program refinement/redesign to align and engage current and expanded membership base.

Further details as to the scope of this opportunity and the requirements can be found within this RFP.

2 RFP PROCESS RULES

2.1 Definitions

Throughout this Request for Proposals, the following definitions apply:

“Addenda” means all additional information regarding this RFP including amendments to the RFP;

“Closing Location” includes the location or email address for submissions indicated on the cover page of this RFP,

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by the Work Wellness Institute and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with The Work Wellness Institute;

“must”, or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;

“Proponent” means a person or entity (excluding its parent, subsidiaries or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP;

“proposal” means a written response to the RFP that is submitted by a Proponent;

“Request for Proposals” or “RFP” means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by The Work Wellness Institute

“should”, “may” or “weighted” means a requirement having a significant degree of importance to the objectives of the Request for Proposals; and

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP,

including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent’s proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound.

2.3 Submission of Proposals

- a) Proposals must be submitted before Closing Time to the Closing Location using one of the submission methods set out on the cover page of this RFP. The Proponent is solely responsible for ensuring that, regardless of submission method selected, the Work Wellness Institute receives a complete Proposal, including all attachments or enclosures, before the Closing Time.
- b) For electronic submissions, the following applies:
 - (i) The Proponent is solely responsible for ensuring that the complete electronic Proposal, including all attachments, is received before Closing Time;
 - (ii) The maximum size of each attachment is to be 20 MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent’s internet service provider);
 - (iii) Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity.
 - (v) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by

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electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted.

- c) For email proposal submissions, including any notices of amendment or withdrawal, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, and the project or program title.
- d) The Proponent bears all risk associated with delivering its Proposal by electronic submission.

2.4 Additional Information

All Addenda will be posted on the Work Wellness Website. It is the sole responsibility of the Proponent to check for Addenda on the website. However, the Work Wellness Institute will endeavour to notify Proponent's of any change at the contact information provided.

2.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated.

2.7 Firm Pricing

Prices will be firm for the entire Contract period.

2.8 Completeness of Proposal

By submitting a proposal, the Proponent warrants that, the RFP is to design, create or provide a system, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.9 Changes to Proposals

By detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time.

2.10 Conflict of Interest/No Lobbying

- a) A Proponent may be disqualified if the Proponent's current or past corporate or

other interests, or those of a proposed subcontractor, may, in The Work Wellness Institute opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor or representative of The Work Wellness Institute. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the the Work Wellness Institute prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

- b) A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly, may result in disqualification of the Proponent.

2.11 Subcontractors

- a) Unless the RFP states otherwise, The Work Wellness Institute will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. The Work Wellness Institute will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed sub-contractors, if applicable.
- b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.
- c) A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, that may give rise to an actual or potential conflict of interest in connection with the services described in the RFP. By submitting a

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proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

- d) Where applicable, the names of approved subcontractors listed in the proposal will be included in the Contract. No additional subcontractors will be added nor other changes made to this list in the Contract without the written consent of the Work Wellness Institute.

2.12 Evaluation

- a) Proposals will be assessed in accordance with the evaluation criteria. The Work Wellness Institute will be under no obligation to receive further information, whether written or oral, from any Proponent. The Work Wellness Institute is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a proposal.
- b) The The Work Wellness Institute may consider and evaluate any proposals from jurisdictions beyond British Columbia suppliers on the same basis that local Proponents adhere.

2.13 Contract

- c) Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.14 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to The Work Wellness Institute within thirty days of notification of the successful Proponent, the Work Wellness Institute may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

2.16 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations. The Work Wellness Institute will not be liable to any Proponent for any claims, whether for costs, expenses, damages or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.17 Limitation of Damages

By submitting a proposal, the Proponent agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

2.18 Liability for Errors

While The Work Wellness Institute has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by The Work Wellness Institute, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.19 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP does not commit the The Work Wellness Institute in any way to award a Contract.

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2.21 Legal Entities

The Work Wellness Institute reserves the right in its sole discretion to:

- a) Disqualify a proposal if The Work Wellness Institute is not satisfied that the Proponent is clearly identified;
- b) prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to the The Work Wellness Institute that the Proponent has the power and capacity to enter into the Contract;
- c) not to enter into a Contract with a Proponent if the Proponent cannot satisfy the Work Wellness Institute that it is the same legal entity that submitted the Proponent's proposal; and
- d) require criminal record checks for a Proponent who is a natural person, subcontractors and key personnel before entering into a Contract and decline to enter into a Contract with a Proponent or to approve a subcontractor or key personnel that fail to pass the screenings to the Work Wellness Institute's satisfaction.

consider such clarifications in evaluating the proposal;

- d) at any time, to reject any or all proposals; and
- e) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

2.23 Ownership of Proposals

All proposals and other records submitted to the Work Wellness Institute in relation to the RFP become the property of the Work Wellness Institute and, will be held in confidence.

2.22 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, the Work Wellness Institute reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering into a Contract with a Proponent;
- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and

3 SITUATION/OVERVIEW

3.1 Work Wellness Institute Overview

The Work Wellness Institute is a not-for-profit organization founded in 1985 as an applied research centre investigating chronic disease and the treatment of pain. In response to industry and community needs, we sharpened our organizational focus on workplace health and the transfer of research into practice. As an organization, we are committed to our core purpose of conducting and supporting global research and mobilizing knowledge that positively impacts workplace health practices.

The Work Wellness Institute's vision is to create safe, healthy and inclusive workplaces by turning research into practice. Working with multidisciplinary stakeholders in the public and private sectors to build and share the latest research on work wellness, we aim to foster a culture of lifelong learning.

Our current products and services include webinars, panels, conferences, subject matter expert presentations and interviews, self-paced courses and facilitated workshops, all hosted virtually. The products are aimed at a variety of audiences including: leaders, managers, HR professionals, employees with disabilities, vocational rehabilitation professionals and labour organizations to help educate them in best practices for healthy workplaces.

As we continue to strengthen a reputable foundation as a research organization focused on knowledge mobilization, we aim to grow our programming and research reputation through our extensive existing network of partners and stakeholders.

3.2 Background

Through the Work Wellness Institute's programming and research initiatives, research outcomes and practical resources will be created that are accessible, standardized and based on practice. We will aid employers across Canada in creating recruitment and retention policies and processes for their employees with disabilities throughout economic disruption. The design, development, distribution, and uptake of research results and resources will lay a foundation for future methods of quickly transferring knowledge and skills when they are needed most – reliable, credible and easily accessed.

Covid-19 has also created an uncertain landscape and new tools are required to support employment of people with disabilities during the ongoing and post-pandemic. Leveraging funds secured, stakeholder input, project experience, the Work Wellness Institute's programming has the potential to directly reduce the negative impact of the current global health crisis and form new vehicles of knowledge mobilization for the future.

Deliverables will be aimed at organizational leaders and employers to build on skills and knowledge that create inclusive, healthy and productive workplaces, fostering work environments that allow individuals to fully contribute to their employments. We will be working with academics and subject matter experts, content developers, curriculum developers and a media production company, and across internal departments to rapidly produce courses and resources.

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Final content will be available through the Work Wellness Institute website, the Work Wellness Institute e-campus, the Work Wellness Institute Resource Portal, and the Workistic App.

Education Resource Deliverables will target skills, knowledge acquisition and confidence in the following areas:

- Helping employers set up accessible, effective, and flexible work-from-home measures
- Providing employer-focused supports to create inclusive workplaces, whether virtual or physical
- Connecting people with disabilities, including those working from home, and employers
- Understanding and capability for employers in creating recruitment and retention policies and processes for their employees with disabilities throughout economic disruption
- Navigating the challenges resulting from socioeconomic disruptions and/or psychosocial hazards in the workplace
- Exploring the future of work

The Work Wellness Institute's Project Objectives are to:

- Track the dissemination and uptake of resources through an expanded network while identifying the formats and efficiencies that will drive increased awareness and mobilize key evidenced-informed knowledge and skills to the end-user.
- Develop, implement, evaluate and scale-up innovative, evidence informed solutions to foster job recruitment and retention for people with mental health challenges and physical disabilities
- Research the process of rapid project design, implementation and evaluation. Covid-19 and its socioeconomic impact has required rapid response in the field of research and policy design and there are lessons to be learned regarding the challenges of this approach and the frameworks and foundations required to strengthen Canada's response to ongoing and future disruptions.
- Provide information to support safe, healthy and inclusive workspaces through and beyond a global pandemic. We will do this by:
 - Creating online courses and resources that use timely, high-quality research that showcase best practices.
 - Creating timely e-resources in various accessible formats including audio and visual.
 - Creating content that is accessible to people with disabilities.
 - Identifying and conducting research on community driven and emerging research questions

Marketing deliverables: Examples include but aren't limited to:

- Design, develop and manage the implementation of one-year's worth of marketing campaigns at a total of 12 campaigns, and 2-3 additional campaigns to add to the pool
- Review, make recommendations, redesign, develop, as well as oversee the implementation and launch of the Work Wellness Institute's membership program.
- Provide marketing guidance and expertise to the organization overall to strengthen and streamline the Work Wellness Institute marketing initiatives based on the preliminary marketing plan.
- Prioritize and develop workplans based on preliminary marketing plan.
- Update Vice president of Business Operations and/or relevant team members on marketing deliverables weekly
- Organize and lead workshops within the organization as needed

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3.3 Technical Requirements

- Demonstrated marketing experience of 10+ years
- Familiarity with the not-for-profit sector

3.4 Accessibility

Due to the nature of our organization, which provides resources to clients and visitors interested in work wellness and disability resources, it is crucial that our resources, marketing (including our website) are as accessible as possible. We strive to achieve the highest levels of accessibility, outlined here: <https://www.w3.org/TR/WCAG21/>. **Project deliverables will require accessibility standards to be met at each iteration of development and follow organizational branding guidelines.**

3.5 Responsibilities

As the selected Proponent, you will:

- Prioritize and build out marketing campaigns over a one-year period at one campaign per month based on preliminary marketing plan and 2-3 additional campaigns to add to the pool.
 - This includes the design, development and overseeing implementation of each campaign such as identifying and planning necessary resources and creating a workplan
- Based on proposed marketing plan:
 - Prioritize project activities
 - Create a project plan for the year based on the understanding of resources and capacity available
 - Support the creation of workplans based on the project plan
- Review the Work Wellness Institute's membership program, and based on review, recommendations, and redesign
 - Create project plan to include necessary elements to implement the agreed on program
 - Create a marketing/engagement plan to existing and expanded membership base
- Participate and/or lead routine, project-based meetings and workshops aligned to the above.

The Work Wellness Institute will:

- Provide access to team for workshopping, feedback and support
- Provide necessary resources
- Share organizational knowledge that shall remain confidential
- Schedule regular stand-up meetings.
- Provide set project timelines based on agreed milestones.
- Responsible for agreed on execution of workplans by team

4 CONTRACT

4.1 Contract Terms and Conditions

The Contractor's responsibilities will include the following:

- Prioritize and build out marketing campaigns over a one-year period at one campaign per month based on preliminary marketing plan and 2-3 additional campaigns.
 - This includes the design, development and overseeing implementation of each campaign such as identifying and planning necessary resources and creating a workplan
- Review the Work Wellness Institute's membership program, and based on the review, recommendations, and redesign:
 - Create project plan to include necessary elements to implement the agreed-on program
 - Create a marketing/engagement plan to existing and expanded membership base – aligned to priorities
- Based on the proposed marketing plan:
 - Prioritize project activities
 - Create a project plan for the year based on the understanding of resources and capacity available
 - Support the creation of workplans based on project plan
 - Oversee progress and provide advisory role on implementation/execution
- Participate and/or lead routine, project-based meetings and workshops aligned to the above.
- Provide regular opportunity for team and leadership input.

5 REQUIREMENTS

In order for a proposal to be considered, a Proponent must clearly demonstrate that they meet the mandatory requirements

5.1 Capabilities

5.1.1 RELEVANT EXPERIENCE

The Proponent and any subcontractors of the Proponent:

Proponents and any subcontractors must demonstrate:

- 10+ years experience design, developing and implementation of effective marketing campaigns and stakeholder engagement programs.

5.1.2 APPLICATION

- Name a contact person for the proposal, and include this person's address, phone number and email address. This information will not be evaluated but is used to contact the Proponent as required.

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- Provide examples which demonstrate prior experience with projects of similar scope and complexity to the requirements outlined in the RFP.
- Proponents are asked to speak in-depth to their role in the project and any relevant technical details.

5.2 Price

Prices quoted will be deemed to be:

- a) in Canadian dollars;
- b) inclusive of duty, FOB destination, and delivery charges where applicable; and
- c) exclusive of any applicable taxes

6 PROPOSAL FORMAT

Proponents should ensure that they fully respond to all requirements in the RFP in order to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed in order to provide consistency in the Proponent's response and ensure each proposal receives full consideration. All pages should be consecutively numbered. Please keep responses to a **maximum of 7 pages**.

- a) Identification of Proponent (legal name)
- b) Signed cover page.
- c) Table of contents including page numbers.
- d) A short (one page maximum) summary of: the key features of the present proposal **and** what would be *your* technical approach to the project.
- e) A CV (two page maximum) listing selected experiences, education, technical projects, and technical skills.
- f) The body of the proposal, including pricing, i.e. the "Proponent Response".
Identification of Proponent contact (if different from the authorized representative) and contact information.

7 EVALUATION

Evaluation of proposals will be by a committee formed by the Work Wellness Institute and may include employees and contractors and other appropriate participants. Proposals will be assessed in accordance with the entire requirement of the RFP, including mandatory criteria. Selected proponents who meet our criteria will be invited to a short 15-minute to 30-minute meeting to assess technical background and candidate experience, as well as to assess an appropriate quote.

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7.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria
The proponent must meet all mandatory technical requirements
The proposal must be submitted by the closing date and time
The proposal must include all requested information and be formatted professionally. (see Section 6)