
Request for Proposals

**Consulting Services for
Brand & Media Development
Phase 2**

Bay of Fundy Gateway Project

December 2016



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**Brand & Media Development Consulting Services
Phase 2
Bay of Fundy Gateway Project**

December 2016

1. Definitions:

- 1.1 "*Consulting Team*" means the entities who have submitted a proposal under this RFP;
- 1.2 "*Key Personnel Proponent*" means the key staff of the Consulting Team that is being proposed to be assigned to this project;
- 1.3 "*Project Steering Committee*" means the committee comprised of representatives from the Town of Truro (2), Municipality of Colchester (2), and citizen appointments (2) and key stakeholders (4) who will oversee the Bay of Fundy Gateway Project;
- 1.4 "*Project Manager*" is the individual appointed by the Project Steering Committee responsible for coordinating the Project with the Consulting Team;
- 1.5 "*Project*" means the Bay of Fundy Gateway Project;
- 1.6 "*Selection Committee*" means the committee struck by the Project Steering Committee to evaluate the proposals submitted under this RFP.

2. Introduction:

In April of 2015, the Municipality of Colchester acquired the former Palliser property, a prominent 10-acre parcel of land adjacent to Highway #102 in Truro, with the intention of developing a gateway to the Bay of Fundy Region. This site is strategically located along the most highly travelled traffic corridor for visitor traffic in Nova Scotia at the head of Cobequid Bay, the easternmost part of the Bay of Fundy. The land, which for the last 55 years was home to the Palliser Hotel and Restaurant, is a highly accessible and visible area which has had a long association with tidal bore viewing. For decades, tourists and locals alike would visit the site to watch the bore roll in which was in part made possible by a gracious and accommodating property owner who provided staff to assist in operating a small tourist information centre erected on his property for several years.

The Bay of Fundy Gateway Project is an ambitious and important project to the Councils of Colchester and Truro who anticipate it can transform the identity, significance and future of its sometimes underappreciated jewel, the Bay of Fundy. As an initial step towards this end, Councils embarked on a master planning exercise in the spring of 2016 to determine an appropriate framework and preliminary design concepts aimed to help establish the Region as a leading provincial tourist destination. This endeavour was built on previous tourism studies of the Region as well as a comprehensive stakeholder and public engagement program that were used to inform the development of the plan and acknowledge the wide range interests throughout the Region. The project outcomes are hoped to be far reaching and long-lasting, benefiting the many communities and organizations that fall within its reaches and raise the profile of the Bay to the world-class standard it warrants.

With the “product development” phase completed, the Project Steering Committee wishes to turn its attention to the “brand development” stage which will aim to establish a carefully crafted and long lasting identity for the project. To this extent, Phase 2 will involve a comprehensive brand and media development strategy comprised of logos, taglines, wayfinding and site signage templates as well as web based media applications for the project. Work carried out under the previous masterplan phase will provide a useful and relevant backdrop to initiatives associated with this undertaking, especially in terms of the project’s vision, guiding principles and outcomes of the stakeholder engagement process.

To this end, the Project Steering Committee is issuing this Request for Proposals with the intention to engage a creative and experienced consulting team of professionals who have the capacity to lead a project brand building process. The issuance of this RFP will initiate the consultant selection process for Phase 2 and its purpose is intended to:

- Provide a "Terms of Reference" for a project branding and identity exercise that will strengthen and support efforts to establish the Bay of Fundy Region as a competitive destination.
- Outline a project context as well as identify the Project Steering Committee's interests, principles and expectations of the Consultant;
- Identify a consistent measure in regards to the content and evaluation of submissions made under this RFP.

Consultant Selection Process & Project Timeline

Request for Proposals Issued	December 22, 2016
Request for Proposals Closed	January 16, 2017
Award of Contract	January 25, 2017
Project Start-up	February 6, 2017
Completion of Final Report	June 12, 2017

A Project Steering Committee has been established to provide guidance and direction to the Consultant through the brand development process. The Consultant will work with the Project Steering Committee, as well as key stakeholder groups and any working sub-committees as appropriate. Colchester municipal staff will help coordinate the activities between the PSC, major stakeholders, other committees and the Consultant.

3. The Bay of Fundy Region & Gateway Project Context:

The Bay of Fundy is a national treasure and a rare natural wonder that earned it to be shortlisted to among 28 and Canada’s only entry to the New 7 Wonders of the Natural World in 2011. Most recently on February 26, 2014 the Bay of Fundy was declared one of the Seven Natural Wonders of North America, along with the Grand Canyon, Yellowstone National Park, Yosemite National Park, the Everglades, Niagara Falls, and the giant redwoods of California found in Sequoia National Park and Redwoods National Park. The Bay of Fundy was noted for representing the largest tidal change in the world over a single day.

The Bay of Fundy Region also has a rich cultural and natural history that has garnered both national and global attention. Perhaps most well-known for the highest recorded tides on the planet (16.2 metres or 53 feet), the Bay of Fundy is also the world's most dynamic tidal coastline shaped by the one hundred billion tonnes of sea water that flows in and out of the Bay twice daily – more water than the combined flow of all the world's fresh water rivers. The geophysical history of the Bay of Fundy has created spectacular landforms and distinctive coastal and terrestrial environments. These, coupled with the Bay of Fundy tidal phenomena, have formed some of the world's most unique ecosystems and geologic formations. The Bay of Fundy has also received global recognition for its rare fossils, unique habitats, aquatic life and rock formations and drawing scientists, researchers and visitors from far and wide. It is also a critical international feeding ground for migratory birds as well as a vibrant habitat for rare and endangered Right whales as well as eleven other species of whales.

The recent acquisition of the former Palliser property has been a catalyst for the Municipality of Colchester in partnership with the Town of Truro to explore the possibilities for a comprehensive masterplan involving both development of the land and broader tourism programming initiatives. In 2013, "A Tourism Strategy for Nova Scotia" was released by the Nova Scotia Tourism Agency which highlighted the issues and opportunities the province faces in an ever-competitive tourism market. Tourism Nova Scotia has identified the Bay of Fundy as one of five competitive destinations in the province and as such hopes to more firmly establish the Region as a leading tourism destination point. This objective among others, underpinned the development of the master planning exercise which aimed to establish the Gateway Project to be the Region's major point of assembly and departure to the vast array of experiences the Bay of Fundy has to offer.

4. Project Concept & Principles:

Front-end planning for the Gateway project was a crucial step as it brought together a wide range of regional interests could be evaluated and incorporated into a meaningful plan for site. Central to this process was an extensive consultation program with an array of stakeholders that informed issues, opportunities and priorities which served as a foundation on which the masterplan evolved. Significant outcomes to this "product development" process involved a package of amenities and programming opportunities that emphasized the importance of quality visitor experiences built around a celestial and science based theme of this rare natural phenomena. An equally important outcome of this exercise was the recognition many residents of the area have come to value the tranquillity and natural character of the landscape. To this end, the masterplan attempts to strike a balance between creating economic opportunities through tourism growth while at the same time providing amenities and preserving site qualities that local residents have come to enjoy. Collectively, these principles will underpin the ultimate goal of establishing a well-performing destination that is positioned for sustainable growth and increase the number of first time visits to the Region and increasing tourism expenditures.

The "brand development" component to the Fundy Gateway Project is intended to build on the overarching principles that have evolved thus far in the process and be symbolic of the project's thematic objectives. To this end, the brand should motivate interest, curiosity and exploration while highlighting its differentiation in the tourism market. Additionally, it is envisaged the brand will be distinctive yet mindful of similar initiatives undertaken by Tourism Nova Scotia in recent times.

5. Project Costs:

Project costs and level of effort for the required consulting services is anticipated to be completed within a budget of \$40,000 plus HST. Should respondents to this RFP feel this budget requires an adjustment, an explanation of any changes should be outlined and justified in the Proposal.

6. Scope of Services:

The Bay of Fundy Gateway Project is a multi-faceted undertaking requiring a broad range of consulting skills and experience. With the completion of the masterplan document, Phase 2 will comprise a review of previous studies, an evaluation of existing tourism branding projects and best practices as well as a stakeholder consultation program. The outcomes of these investigative components will inform a project brand that represents:

- project philosophies, elements and themes;
- a strong creative brief that defines the brand vision, promise and position for the future while recognizing the present;
- conveys the Region's strengths and uniqueness while differentiating it from other competitive destinations;
- builds on the successes of established best practices used elsewhere;
- stakeholder buy-in;
- signage and media programs that provide an engaging brand experience and brand delivery tool(s);
- respect for the provincial tourism brand identity in a manner that does not confuse visitors or conflict with the objectives of other organizations and/or attractions;

For the purposes of this Request for Proposals, the Consulting Team will include but not limited the following scope of services and a detailed explanation of the Proponent's approach methodology shall be included as part of the Proponent's submission (as per Section 7 of this RFP).

6.1 Analysis & Review:

- Compile and review existing studies, existing branding and signage programs, marketing initiatives and other tourism related projects in the Region.
- Review current tourism market trends (local, national, international), provide a synopsis of competitive destination requirements and highlight successful initiatives implemented elsewhere relative to brand development.
- Identify media and e-media opportunities that can help strengthen and promote the brand identity throughout the tourism sector.
- Define market segments and target audiences.
- Identify and prioritize product differentiators and competitive offerings within tourism markets.
- Recommend a defined approach to brand decision-making (ie. decision-making matrix or similar type of assessment tool).

6.2 Stakeholder Engagement Program:

- Building on previous consultation initiatives, identify potential project stakeholders and develop a strategy through which broad public engagement can be achieved (ie. focus groups, public meetings, surveys, interviews, etc.).
- Organize and conduct stakeholder engagement activities with a view to identify, document and share stakeholder interests.
- With direction from the Project Steering Committee, determine the extent to which stakeholder interests are evaluated and represented in the branding exercise.

6.3 Brand & Media Development:

Identify, evaluate and develop:

- Brand, collateral and media requirements that will meet current and future needs;
- Social media and website frameworks and applications including interactive components that have the capacity to gather, share and analyze data, visitor experiences and promotional initiatives;
- A brand identity that is complementary to architectural and site design themes;
- Relationship of the brand to provincial and other key branding initiatives with a view to establish a sense on uniformity amongst these if warranted;
- A brand standards handbook which highlights how the brand should be used including but not limited to, a brand positioning statement, brand promise, brand personality and other key elements that other stakeholders may apply in support of their own brand priorities.
- Provide cost estimates and a proposed implementation schedule for branding and media development priorities.

6.4 Signage Program:

- Develop a cost effective signage strategy for the project including freestanding signs, interpretive panel templates, wayfinding signs and pictograms that may be incorporated on provincial directional / attraction signage;
- Identify signage components necessary for different stages of the project, namely the pre-construction, construction and operational phases;
- Prepare tender-ready drawings and specifications for the signage program together with cost estimates.

6.5 Media Program:

- Develop interactive social media and website templates for the purposes of providing project information, updates, events, announcements, etc. using frameworks through which project staff can regularly update and administer;
- Identify social media and website requirements for different stages of the project;
- Recommend cost effective approaches to the e-media program together with advice on strategic roll-out and positioning.

7. Proposal Submission Content:

To establish the capabilities and qualifications of proponents, specific information is requested, including corporate profile, service delivery capability, project management and technical support ability, relevant experience and references, management support programs, proven successes in

similar undertakings, related management experience and additional background information as outlined herein.

Proponents are encouraged to submit a succinct and detailed document in support of their capacity to meet the requirements of this "Request for Proposals". Elaborate brochures or voluminous examples are not required, nor desired.

To assure a uniform review process and to obtain the maximum degree of comparability, each proposal shall contain the following information:

7.1 A brief statement outlining the proponent's understanding of the Bay of Fundy Gateway Project and the requirements of the Project Steering Committee.

7.2 Consulting Team Information:

- i) Mission, vision and values of the proponent;
- ii) Overview of capabilities and services;
- iii) Three related customer references including location, customer contact, nature of services, value of contract and key outcomes achieved;
- iv) Outline criteria that differentiate the proponent from its competitors;
- v) composition and organizational structure of members including both sub-consultants and individuals proposed to be assigned to the project, and approach to team coordination;
- vi) Background and experience of Key Personnel and relevant experience in provision of similar services, assignments of similar scope and complexity, in particular with similar project undertakings.
- vii) Previous experience, success and/or knowledge regarding brand and media development in the tourism sector.

7.3 Project Approach, Methodology, Management:

- i) Scope of Services:
 - Outline of approach to completing all aspects of the scope of services, including for each service area a statement as to whether this service would be self-performed or sub-contracted; and
 - Approach to maximizing "value for money".
- ii) Project Approach & Management
 - Proposed management of the project;
 - Approach to client contact, communications and reporting;
 - Detailed work plan of all components outlined in the scope of work in accordance with the preferred time lines and Gantt schedule, including a work breakdown matrix of all personnel, showing anticipated hours of involvement and total percent involvement. The work plan should be broken down by phase of work and identify subtotals for each phase as well as total project hours;
- iii) Cost Control Methodology
 - Description of the methodology for costing at various stages to control Project costs.
- iv) Schedule Control
 - Describe methods/personnel to be used to meet project schedules, i.e. tracking of milestone deadlines, sufficient resources, balancing current and future work loads of proponent, etc.

- v) Other:
 - Overview of information systems and technology applications that would be utilized to document and share relevant project information and concepts;
 - Identification and estimated costs of optional specialized consulting areas that may be needed as the process proceeds;
 - Identification of any perceived gaps or omissions in the Scope of Services described above that would be beneficial to the desired project outcomes, and;
 - Any other relevant information.

7.4 Financial and Contract Terms

- i) Statement of acceptance of terms and conditions of the Request for Proposals, including agreement to enter into an agreement;
- ii) Approach to adjusting contract terms for a decrease or increase in scope of services;
- iii) Percentage fees for individual project components as well as any additional work fee information;
- iv) Description of costs for additional professional services and expenses not forming part of the percentage fee of (iii) above.

8. Evaluation Criteria:

Submissions to the "Request for Proposals" will be reviewed by a Selection Committee comprising members of the Project Steering Committee and Municipal Staff as appropriate. All proposals must comply with all requirements outlined in this document and all submissions will be evaluated and ranked against the following criteria and associated weights.

It will be understood that the degree to which a proposal meets the Project requirements by means of the proposed point score system will be the sole judgment of the Selection Committee.

Weight (%) Consideration

45% *Consulting Team Information:*

- team composition and representation by all necessary disciplines, including graphic design, marketing, and brand development and;
- relevant experience in completing assignments of similar scope and complexity, and;
- experience of the proponent and key team members with similar projects and the range of specified services;
- completeness of consulting team and demonstrated experience / expertise of all individual members;
- proposed organizational structure and coordination of the individual team members including reporting relationships, identification of lead members, and communication strategy;
- availability of back-up personnel and/or provision to access specialized skills;
- results of reference checks for previous projects;

35% *Project Approach, Methodology & Management:*

- approach to the scope of the creative and technical services required;
- understanding of project requirements;
- management of project and suitability of the proposed work plan, including work program components, Gantt chart of time schedule and contribution matrix of all personnel showing anticipated hours of involvement;
- compliance with the Project Steering Committee's Scope of Services as well as guiding principles for competitive destination development by the Nova Scotia Tourism Agency;
- provisions for involvement, input, evaluation of the Project Steering Committee, its working Sub-Committee's, stakeholders, and the general public;
- ability to meet or the project timelines;

20% *Proposed fees, value for money and acceptance of terms and conditions;*

- Fees for services required and any contingencies if applicable;
- Value for money represented by a function of time allocation to total cost.

To assist in the review and evaluation process of submissions received under this RFP, the Project Steering Committee may wish to conduct interviews of the Consulting Team as a means of developing a better understanding of the proponent's experience and approach to Phase 2 of the Bay of Fundy Gateway Project. Mutually convenient times will be arranged shortly after the PSC has had an opportunity to review the submissions to this RFP.

9. Acceptance of Proposals:

Proposals that are unsigned, incomplete, conditional, illegible, unbalanced, obscure, or that contain additions or deletions not called for, reservations, erasures, alterations, or irregularities of any kind, may be rejected as informal.

The Project Steering Committee reserves the right to waive any irregularity or insufficiency and to accept the proposal which it deems most advantageous. The lowest or any submission will not necessarily be accepted.

The Project Steering Committee will not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by a Consultant prior to, or subsequent to, or by reason of the acceptance or the non-acceptance by the Project Steering Committee of any submission, or by reason of any delay in the allowable period of acceptance of a submission.

It is important to note the Project Steering Committee is not bound to accept any or all "*Request for Proposals*" and no contractual relationship with the Committee shall come into existence through this process until such a time as the Committee formally deems appropriate.

10. Discrepancies and Omissions:

If any potential proponent is contemplating submitting a proposal for the work and is in doubt as to the meaning of any part of the *Request for Proposals*, or finds discrepancies in or omissions

from any part of the *Request for Proposals*, the Proponent may deliver to the Project Steering Committee a written request for a written interpretation or correction thereof not later than ten days before the Closing Date. Inquiries received after that time may not be answered prior to the closing time of the RFP. All inquiries and other communication regarding the RFP are to be directed **ONLY** to the Project Manager. Non-compliance with this condition during the proposal phase shall result in a disqualification of the proponent. The Proponent may not rely on any interpretation or correction except those which are provided in writing. The inquiry must be made to the Project Steering Committee c/o of the Project Manager the address identified in Section 13 below.

To ensure consistency and quality of information provided to proponents, Project Steering Committee will provide, simultaneously to all Proponents any information with respect to inquiries received and replies to such inquiries without revealing the sources of the inquiries.

11. Formal Contract:

The successful proponent will be required to execute a formal contract, in a form acceptable to the Project Steering Committee to give effect to the services required.

12. General Terms and Conditions:

12.1 Licensing Requirements:

The Key Personnel, where appropriate, shall be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by law in the Province of Nova Scotia.

12.2 Location of Proponent's Registration:

The successful Proponent must comply with the Nova Scotia *Corporations Registration Act* or *Partnerships and Business Name Registration Act* before a contract is awarded.

12.3 Integrity of Consulting Team Maintained:

Proponents are advised that the Key Personnel named in the RFP submission shall remain in their designated roles throughout the RFP period and for the duration of the Agreement unless a change of personnel is authorized in writing by the Project Steering Committee. Failure to honour this requirement may result in rejection of the proposal and/or termination of the Agreement.

12.4 References:

References identified in the proposal may be contacted by the PSC or its representatives to substantiate the consultant team's capabilities, reliability, performance and overall service.

Proponents are expected to cooperate fully in helping the owner and its representatives to verify the Proponent's claim.

12.5 Ownership of Proposals and Access to Information:

All documents, including proposals, submitted to the owner become the property of the owner and are potentially subject to disclosure under the Nova Scotia *Freedom of Information and Protection of Privacy Act* or the *Personal Information Protection and Electronic Documents Act*, the *Municipal Government Act* or otherwise. By submitting a proposal, the Proponent thereby agrees to public disclosure of its content. Any information the Proponent considers 'personal information' because of its proprietary nature should be marked as "confidential" and will be subject to appropriate consideration but cannot be guaranteed protection from disclosure.

The PSC maintains the right to make copies of all Proposals for its internal evaluation process and provide copies to the Selection Committee.

12.6 News Releases/Public Announcements:

Proponents shall not make news releases or public announcements concerning the RFP or the awarding of the Agreement without the written consent of the Project Steering Committee and then, only in coordination with the Project Steering Committee.

12.7 Proposals Open for Acceptance:

Proposals shall remain open for consideration and acceptance by the Project Steering Committee and be irrevocable for sixty (60) days after the proposal closing date.

12.8 Liability for Errors:

While the Project Steering Committee has made efforts to ensure an accurate representation of information in this RFP, the information contained in the RFP, including materials incorporated by reference or made available in connection with this RFP, is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by the Project Steering Committee, nor is it necessarily comprehensive or exhaustive.

Each Proponent is solely responsible for conducting its own thorough and complete review of this RFP and ensuring that it has a full and complete understanding thereof.

This RFP must be read in its entirety to understand the project and the RFP process.

Each Proponent shall promptly report, or request clarification of, any discrepancy, deficiency, ambiguity, error or inconsistency, which it discovers during the course of its review.

13. Contact & Submission Information:

Three hard copies and one digital copy (in PDF format) of the **"Request for Proposals"** clearly marked **"Consulting Services — Bay of Fundy Gateway Project – Phase 2 – Brand & Media Development"** will be accepted until **3:00 pm (local time), Monday the 16th of January, 2017.**

Responses to this call for "**Request for Proposals**" may be hand delivered or mailed to the Project Steering Committee at the address indicated below:

Project Steering Committee - Bay of Fundy Gateway Project

c/o Paul J. Smith, MCIP, LPP
Senior Planner / Project Manager
1 Church Street
Truro, N.S.
B2N 3Z5
Phone: 902-897-3170
Fax: 902-843-4061
Email: psmith@colchester.ca

Proponents shall be solely responsible for the delivery of their proposals in the manner and time prescribed. Proposals submitted after the above time will be returned to the Proponent unopened.

Proponents wishing to obtain a copy of the Fundy Gateway Masterplan shall submit a request to psmith@colchester.ca together with a mailing address. The documents will be copied to a USB memory and posted within 1 business day of receipt of the request. The Project Steering Committee requests Proponents use the documents for preparation of their RFP responses only and not disclose any information therein to third parties as these still remain in draft form.

14. Addenda to RFP:

The Project Steering Committee may issue addenda adding to, deleting from, clarifying, or varying provisions in this *Request for Proposals*. In the event addenda are needed, the Project Manager will notify the Project Principal of the Proponent by email or telephone of the change(s) to be followed-up by written correspondence. **Verbal answers are only binding when confirmed by written addendum.** All addendums become part of the Contract and proponents must include cost implications of all addendums in its fee proposal.

15. Reference Documents:

1. UPLAND Planning & Design; *"Bay of Fundy Gateway Master Plan"* - Project Steering Committee; December 2016.
2. RMA Tourism Limited; *"Bay of Fundy – Interpretation and Attraction Development Plan"*; 2010.
3. Nova Scotia Tourism Agency; *"A Tourism Strategy for Nova Scotia"*; Windsor, Nova Scotia; 2013.
4. Nova Scotia Tourism Agency; *"Tourism Development Investment Competitive Edge Program – Guidelines and Application Form"*; Windsor, Nova Scotia; 2015.
6. Roger Brooks International; *Assessment Findings and Suggestions Report Truro, Nova Scotia & Surrounding Areas*; October, 2015

ATTACHMENT 1 Location Map



