



## NEGOTIATED REQUEST FOR PROPOSAL (NRFP)

### 1.0 Invitation

*Visit Oakville* invites submissions of proposals from qualified firms for a two-phase project. Phase 1: Review and propose a new modern Strategic Plan for *Visit Oakville*. Phase 2: Develop a Three-Year Action Plan to help operationalize strategic direction. Proposals must be submitted no later than Wednesday, Oct. 31, 2018 at 5 p.m. to [Rebecca.edgar@oakville.ca](mailto:Rebecca.edgar@oakville.ca). Please refer to Appendix A for the full terms and conditions of this NRFP.

### 2.0 Background

#### 2.1 About Oakville

Oakville is a lakeside town in Southern Ontario, located off the busy QEW corridor between Toronto and Niagara Falls. It is bordered by Mississauga to the east, Burlington to the west, Milton to the north and Lake Ontario to the south. Its lakeside, including harbours in the downtown and Bronte areas, as well as numerous parks, trails and attractions, are popular with visitors.

Oakville's population is just over 200,000, and while being large enough to be considered a city, it remains the Town of Oakville. Traditional neighbourhoods like Bronte Village and Old Oakville maintain a quaint, small-town feel, while the town overall offers all the modern amenities and conveniences of a large city. Oakville is home to Glen Abbey Golf Course, the Canadian Golf Hall of Fame and Museum, Appleby College, Sheridan College, iFLY Toronto, Bronte Creek Provincial Park and more. As with most municipalities in the Greater Toronto Area, Oakville is experiencing rapid growth.

In 2018, Oakville was selected the best place to live in Canada by MoneySense magazine\*. It was ranked #1 place for new Canadians, 3<sup>rd</sup> best place to retire and 5th best place to raise a family.

#### 2.2 About *Visit Oakville*

Established in 2009, *Visit Oakville* (formerly known as the Oakville Tourism Partnership) was established to recognize tourism as an important contributor to the economic vitality of the Town of Oakville. *Visit Oakville* is Oakville's not-for-profit, destination marketing organization (DMO) guided by a board representative of industry partners, including accommodations and attractions. *Visit Oakville*'s mandate reflects a shared interest in contributing to the positive image of the Town and positions itself as a desirable place to visit and spend time and money.



*Visit Oakville* is funded by the Town of Oakville and a number of industry partners. Its current annual operating budget is approximately \$144k with a fiscal year ending on December 31. *Visit Oakville* currently employs two contract staff members. It should be emphasized that *Visit Oakville* is not a department of the Town, but operates at an arm's length from it.

### **3.0 Situation Analysis**

A strategic business plan\* was created for *Visit Oakville* in 2011. Since then, *Visit Oakville* has continued to focus on the original four goals outlined in the plan: advocacy, customer service, destination development and strategic marketing. The plan has never been formally evaluated or updated.

Earlier this year, Oakville Town Council voted to implement the Municipal Accommodation Tax (MAT)\* effective January 2019. This will have a significant impact on *Visit Oakville's* budget and will allow the organization to become self-sustaining. It will provide the opportunity to increase tourism efforts which may include implementing further programs and services, increasing and improving marketing efforts, growing strategic partnerships and securing additional resources.

### **4.0 Project Description**

#### **4.1 Phase 1: Review and Produce Modernized Strategic Business Plan.**

This will be done through research, analysis and collaboration with our stakeholders, including hotels, attractions, government, industry and DMO peers. Phase 1 will include:

- Review *Visit Oakville's* current vision, mission statement and goals
- Refine *Visit Oakville's* vision and mission statement
- Establish a realistic three-year strategic business plan

#### **4.2 Phase 2: Develop a Three-Year Action Plan.**

Building on the research and analysis in Phase 1, Phase 2 will include:

- Develop a three-year plan of action (tactics) for staff and board members
- Establish strategies and tactics that support our new goals
- Create yearly measurable goals and objectives

## 5.0 Project Scope

In the NRFP submission, the firm should detail its approach and work-plan for the project. Any elements not identified below, but which the firm considers necessary to complete the project should be identified and a rationale provided.

### 5.1 Phase 1

1. Review references, existing industry research and best practices.
2. Consult with both internal and external stakeholders to establish a situational and SWOT analysis.
3. Where is *Visit Oakville* currently?
4. What could we be? What are possible future scenarios for *Visit Oakville*?
5. What direction do we want to take?
6. Does this direction support our current vision and mission? Will current goals enable success?
7. What revision can be made to our mission and future goals?
8. Who are our ideal visitors/markets and what type of experiences are they seeking?
9. What do we currently have to offer and how do those align with what our ideas are seeking?
10. What are the slower times of year? Where would additional “heads in beds” have the greatest impact for partners?

### 5.2 Phase 2

1. What is market-ready? What needs improvement?
2. What new products/initiatives should we focus on?
3. How do we best allocate resources to meet our goals?
4. How do we measure success?
5. How and with who should we build relationships/partnerships with to meet our goals?
6. What current research/trends support recommendations?

### 5.3 Stakeholders

Key stakeholders may include but are not limited to:

- *Visit Oakville* staff and board members
- Oakville hotels
- Area attractions
- Business Improvement Areas
- Chamber of Commerce

## 6.0 Deliverables

### 6.1 Phase 1

1. Project kick-off meeting with consultants and *Visit Oakville* Steering Committee
2. Design/facilitate a stakeholder engagement process that includes primary tourism organizations (hotels, attractions), secondary tourism organizations (restaurants, shops), Chamber of Commerce, Business Improvement Areas, government, neighbouring DMOs and other industry partners.
3. Short (email) bi-weekly progress reports to the Executive Director of *Visit Oakville*
4. Liaise with the Steering Committee as required
5. Present Situational Analysis Report to Steering Committee
6. Recommend vision, mission and goals
7. Present strategy recommendations to Steering Committee and/or Board

### 6.2 Phase 2

1. Mid-term meeting with Steering Committee to review Phase 2 objectives
2. Continue with stakeholder engagement process as required
3. Short (email) bi-weekly progress reports to the Executive Director of *Visit Oakville*
4. Liaise with the Steering Committee as required
5. Present draft Three-Year Action Plan to Steering Committee
6. Revise draft if necessary
7. Present Three-Year Action Plan to *Visit Oakville* Board

## 7.0 Project Team

This project is being undertaken by *Visit Oakville* and led by members of a Steering Committee consisting of:

- Meggan Gardner, Chair of the *Visit Oakville* Board
- Rebecca Edgar, Executive Director, *Visit Oakville*
- Julian Kingston, Supervisor, Oakville Museum
- Kristen Thomason, National Director of Sales, iFLY

The project team will be available to provide guidance and feedback to the consultant. Other staff or board members will be consulted as required.

The Executive Director will provide the consultant with data, other related documents and provide final approvals.

The project will be completed to the satisfaction of the *Visit Oakville* Steering Committee.

The Steering Committee expects open communication with the successful consultant team which includes bi-weekly updates via email or phone call.

## 8.0 Proposed Schedule

A draft schedule is below. This is negotiable based on the consultant’s recommended feedback and work-plan.

Task	Date
Release NRFP	Oct. 3, 2018
Proposal Submission Date	Oct. 31, 2018 – 5 p.m.
Proposal Evaluation	Nov. 1 – Nov. 9, 2018
Proponent Notification & Award	Week of Nov. 12, 2018
<b>Project Phase</b>	
Commencement of work (start-up meeting)	Week of Nov. 19, 2018
Present to the Steering Committee – Phase 1	Week of Feb. 18, 2019
Present to the <i>Visit Oakville</i> Board – Phase 1	Feb. 25, 2019
Present draft to Steering Committee – Phase 2	Week of April 15, 2019
Present to <i>Visit Oakville</i> Board – Phase 2	June 25, 2019

## 9.0 Proposal Requirements

All proposals must include the following:

- Your understanding of the project needs
- An outline of your approach to this project
- Proposed work-plan and schedule
- Expectation of requirements from *Visit Oakville* (i.e. what you need from us)
- Description of your project lead and team members
- Three examples of similar projects including references
- Cost before HST



Shortlisted candidates will be required to make a short (20-30 minutes) presentation to the Steering Committee.

## 10.0 NRFP Submittal Guidelines

The proposal must:

1. Be submitted electronically (Adobe PDF file). Your submission should not exceed 15 pages in length. This does not include any work samples or media you may wish to attach.
2. Be accompanied by a cover letter and/or e-mail signed by an authorized representative of your company certifying the accuracy of all information contained in your submission and acknowledging your company's offer of services according to the terms of this NRFP.
3. Be submitted no later than 5 p.m. on Wednesday, Oct. 31, 2018 to [Rebecca.edgar@oakville.ca](mailto:Rebecca.edgar@oakville.ca).

## 11.0 Proposal Evaluation

All proposals will be evaluated by the following criteria:

	Evaluation Criteria	Weighting
1.	Description of the firm, project team and structure <ul style="list-style-type: none"> <li>• Company overview as it relates to scope of work</li> <li>• Identification of project lead</li> <li>• Team members and their experience</li> </ul>	10
2.	Project Experience <ul style="list-style-type: none"> <li>• Demonstrate your firm's experience with strategic and action planning with three examples of projects</li> </ul>	15
3.	Project Approach and Work-plan <ul style="list-style-type: none"> <li>• Summarize understanding of needs</li> <li>• Provide a work-plan of tasks and activities that will be undertaken to complete this project</li> <li>• Describe roles and responsibilities of team</li> </ul>	25
4.	Schedule of tasks and activities <ul style="list-style-type: none"> <li>• Schedule</li> <li>• Approximate timing for meetings with <i>Visit Oakville</i> team</li> </ul>	10
5.	Project Costs and Fee Schedule	20



	<ul style="list-style-type: none"> <li>Total fee with separate costs for disbursements, mileage, markup on sub-consultants, excluding HST</li> <li>Expect staff time and fees by staff assignment, task and activities</li> </ul>	
6.	Presentation (presentations will be required of short-listed proponents only)	20
7.	References	PASS/FAIL
8.	TOTAL	100

## 12.0 Negotiable Terms

*Visit Oakville* may enter into negotiations with the highest ranking consultant and, failing successful negotiations, enter into negotiations with the next highest ranked consultant until *Visit Oakville* concludes successful negotiations and a consultant has been selected.

*Visit Oakville* may use the negotiations process to negotiate any aspect of a proposal, the agreement, or both, that are reasonably required to reflect the terms of the proposal and the goods, services and service levels required by *Visit Oakville*.

During the negotiations process, *Visit Oakville* may request the consultant to submit various pricing options to allow for any additions, deletions or adjustments that *Visit Oakville* may require. It is not the intent of *Visit Oakville* to negotiate lower pricing nor is it the intent of *Visit Oakville* to allow for new or significantly altered proposals, but rather to ensure *Visit Oakville* has the flexibility it needs to arrive at a final Agreement.

*Visit Oakville* reserves the right to negotiate modifications to any proposal with the consultant, without obligation to communicate, negotiate, or review similar modifications with other consultants.

Notwithstanding any negotiations between *Visit Oakville* and a consultant, the proposals of all consultants will remain valid and irrevocable until the expiration of the Irrevocable Time Period.

## 13.0 Consultant Selection

Consultant selection will be the sole responsibility of *Visit Oakville* and will be undertaken at the sole discretion of the *Visit Oakville* in accordance with its selection criteria.

Proposals may be eliminated from consideration at *Visit Oakville's* discretion for any reason, but at a minimum, including but not limited to:



- The NRFP/REQUESTED OUTLINE is substantially incomplete
- The proposal is not responsive to the objectives and requirements of this NRFP
- There is evidence of financial instability of the firm or team
- The NRFP is inconsistent with *Visit Oakville's* policies or requirements
- A conflict of interest exists

#### 14.0 Reference List

MoneySense: <https://www.moneysense.ca/spend/real-estate/canadas-best-places-to-live-2018-winner/>

Visit Oakville strategic business plan: <http://visitoakville.com/wp-content/uploads/2013/10/Oakville-Tourism-Partnership-Business-Plan-2011.pdf>

Municipal Accommodation Tax: <https://www.ontario.ca/laws/regulation/170435>



## APPENDIX A

### TERMS AND CONDITIONS OF THE NRFP

1. Proposals must be submitted no later than Wednesday, Oct. 31, 2018 at 5 p.m. to [Rebecca.edgar@oakville.ca](mailto:Rebecca.edgar@oakville.ca)
2. *Visit Oakville* reserves the right, at its sole option, and for its convenience, to accept and/or reject any NRFP, in whole or in part, for any or no reason.
3. By issuing this NRFP, *Visit Oakville* does not imply or give any assurance whatsoever that any quote will be accepted.
4. No contractual or other legal obligations arise on the part of *Visit Oakville* to any consultant by this NRFP until such time as a final, written agreement, if any, is subsequently entered into with a consultant.
5. *Visit Oakville* may or may not award the business that is the subject of this NRFP to any consultant at *Visit Oakville's* sole discretion. *Visit Oakville* reserves the right to negotiate with agencies, seek clarification from agencies regarding their responses and invite modifications to the quotes submitted.
6. *Visit Oakville* retains the right to withdraw or modify this NRFP at any time without notice and without obligation to the consultant.
7. *Visit Oakville* may waive compliance with the requirements of this NRFP and consider a response that does not meet all of the requirements of this NRFP.
8. Your quote is submitted at your own risk. If, prior to the deadline for submission of quote you fail to notify *Visit Oakville* of an error and your quote is selected, you shall not be entitled to any compensation or time by reason of the error or its later correction.
9. No part of this NRFP will become part of any final agreement between *Visit Oakville* and the agency unless specifically incorporated into a final, written agreement. Any or all contents of your quote may become part of the final agreement.
10. Your response, including fees, shall constitute a binding offer capable of acceptance in whole or in part by *Visit Oakville* and if selected will remain valid until such time as a final agreement is negotiated and executed.



11. *Visit Oakville* shall not be in any way responsible for or liable for any costs associated with your submission and you shall not make claim to *Visit Oakville* for any such cost or expenses.
12. By submitting a response, you agree to waive any right to claim damages against *Visit Oakville* for any reason, cause or thing arising out of the NRFP process.
13. If you are selected, you may be required to provide satisfactory proof of maintenance of relevant insurance coverage (including commercial, professional, general liability and automobile insurance).
14. Primary research will require travel to tourism venue sites across Halton Region. Engagement meetings will be conducted at various locations throughout the region. The use of your personal vehicle for transportation purposes will be required.
15. *Visit Oakville* reserves the right to postpone or change the date for receipt of quotes or any other deadlines and dates specified in this NRFP upon notice. By submitting a quote, the consultant agrees to be bound by any modifications made by *Visit Oakville*.
16. *Visit Oakville* reserves the right to discuss different or additional terms to those included in the NRFP or received in any quote, and to amend or modify any terms of this NRFP.
17. The consultant shall bear all costs and expenses associated with the preparation and submission of its quote. This includes but is not limited to; site visits and inspections; all information gathering processes; interviews, preparing responses to questions or requests for clarification from *Visit Oakville* preparation of questions for *Visit Oakville* and any contract discussions and negotiations.
18. *Visit Oakville* may require consultants to come to *Visit Oakville* for interviews and presentations.
19. *Visit Oakville* reserves the right to discontinue negotiations with any consultant.
20. All submissions become the property of *Visit Oakville*, and will not be returned.
21. Neither *Visit Oakville*, its staff, representatives, nor any of its consultants or agents will be liable for any claims or damages resulting from solicitation, collection, review or evaluation of quotes.



### IRREVOCABLE TIME PERIOD

Proposals will be irrevocable for any reason for a period of not less than ninety (90) days following the submission deadline.

### CONFLICTS OF INTEREST

*Visit Oakville* requires a statement from the vendor indicating that no conflicts of interest exist that would interfere with the objective delivery of services.

### INDEMNITY

The agency will indemnify and save harmless *Visit Oakville*, Board of Directors, its employees and agents from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained by *Visit Oakville* at any time or times (either before or after the expiration or sooner termination of this Contract) where the same or any of them are based upon or arise out of or from anything done or omitted to be done by the agency or by any servant, employee, officer, director, or sub-contractor of the agency pursuant to the contract excepting always liability arising out of the independent acts of the *Visit Oakville*.

### SOFTWARE

It is the consultant's responsibility to ensure that *Visit Oakville* has all licenses required to use any software that may be supplied by the consultant pursuant to the contract.