



REQUEST FOR PROPOSAL

1.0 Invitation

Visit Oakville invites submissions of proposals from qualified firms for a Strategic Plan Refresh. Proposals must be submitted no later than Friday, December 2, 2022, to rebecca.edgar@visitoakville.com. Please refer to Appendix A for the full terms and conditions for this RFP.

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 larger city. As with most municipalities in the Greater Toronto Area, Oakville is experiencing rapid growth.

Oakville consistently ranks as one of the best places to live, raise a family, and retire, as well as the safest region in Canada, and a welcoming place for newcomers to Canada.

2.2 About Tourism in Oakville

Prior to the COVID-19 pandemic, Oakville welcomed over two million people each year. While many visitors are day-trippers and/or here to see friends and family, there are various other reasons people visit Oakville.

2.2.1 Sports

Oakville has a strong sporting culture with supporting facilities. It is known as the long-time home of the Canadian Open at Glen Abbey. Oakville is quickly becoming a curling destination, recently hosting Sportsnet Grand Slam of Curling and Curling Canada's U-18 Nationals, in addition to several national and international events hosted by the Oakville Curling Club. Skate Oakville is home to Team Canada athletes and hosts international and national competitions.

Oakville has some of the largest and reputable sport organizations in Canada, including the Oakville Crusaders Rugby Club, Oakville Soccer Club, numerous hockey clubs, baseball, softball, lacrosse and more.

2.2.2 Business

Oakville boasts a vibrant business community. It is home to three Business Improvement Associations (BIAs) that are destinations in their own right. The town is home to notable corporate head offices such as Ford Canada, PwC and Siemens Canada. The Oakville Chamber of Commerce is a hub for local business and is a supporter of tourism.

2.2.3 Events

Multi-day events like the RBC Canadian Open, Kerrfest and TD Song of Summer have traditionally drawn people to town and are more likely to drive overnight stays. With Oakville's proximity to Toronto and easy access to highways and the GO and competitive hotel pricing, events in the city can also draw overnight visitors to Oakville.

2.2.4 Attractions

Oakville is home to a variety of attractions. With its shops, restaurants and heritage district with the Oakville Museum, scenic parks and the Oakville pier, Downtown Oakville is often the heart of the visitor experience. Oakville is also home to Glen Abbey Golf Club, iFLY Toronto, Bronte Creek Provincial Park, Oakville Galleries and the Oakville Centre for Performing Arts.

2.2.5 Accommodations

There are currently 10 hotels in Oakville, as well as a small boutique hotel and a few B and Bs. Bronte Creek Provincial Park offers seasonal campsites and the Residences at Sheridan College provide a moderate-priced summer alternative. All short-term accommodations (STA) renting for less than 28 days require a license and are regulated by Municipal bylaw.¹

There is no full-service or four-star property.

¹ Town of Oakville (2018). [Short Term Accommodations \(oakville.ca\)](https://www.oakville.ca/short-term-accommodations)

3.0 Visit Oakville

Visit Oakville is an incorporated, not-for-profit, Destination Marketing Organization (DMO). It is guided by a volunteer board of directors comprised of industry and local business members who are recruited to fulfill certain skill requirements. Visit Oakville currently has four full-time staff members, an Executive Director, Marketing and Communications Specialist, a Visitor Experience & Special Projects Specialist, a Marketing & Events coordinator, plus seasonal staff in the summer. There is one FTE vacancy.

3.1 Visit Oakville Strategic Plan

Implementation of Visit Oakville's latest strategic plan² began in 2019 with a focus on three strategic pillars: marketing and partnerships, experience improvement and curation, and advocacy. Despite the challenges of the past couple years, progress has been made particularly in the marketing and partnership area.

3.1.1 Marketing & Partnerships

Over the past few years, the Visit Oakville team has made the most progress in this pillar. As per the strategic plan, the organization completed a re-brand, developed a marketing plan, established marketing and partnership advisory groups, measured partner collaborations, marketing KPIs and analytics. (Albeit the focus shifted to a hyper-local and local audience during the pandemic).

There is an opportunity to develop a detailed partnership plan.

3.1.2 Experience Improvement & Curation

Some progress was made in this pillar. A special projects position was established, some business resources and itineraries were developed, and the Tourism Investment Fund was launched. Due to COVID, visitor satisfaction and length of stays was difficult to measure.

One of the strategic initiatives is to develop a visitor experience strategy that identifies opportunities and addresses gaps in the visitor experience. This is currently underway.

3.1.3 Advocacy

Due to factors such as shifting focus due to the pandemic, and a lack of a dedicated resource to this pillar, less progress was made on advocacy vs. other pillars. While relationships were built and some elements of a community awareness plan were implemented (Talk of the Town

² Visit Oakville (2019). [Visit-Oakville-Strat-Plan-FINAL-REVISED-1.pdf \(visitoakville.com\)](#)

Awards, the Visit Oakville Award for Tourism Excellence), the annual resident survey, a capital investment strategy, advocate recruitment, and hosting “Tourism Talks” did not occur.

There is an opportunity to make significant progress on the advocacy pillar.

4.0 Project Description and Scope

The project is to review and refresh the Strategic Plan through research, analysis and collaboration with stakeholders. This will include an overview of the tourism landscape, understanding the organization’s new mission and vision, and validating and/or recommending new of strategic pillars.

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

5.0 Deliverables

- Project kick-off meeting with Visit Oakville’s strategic planning task force
- Present an overview of the current tourism landscape
- Stakeholder engagement that may include interviews, surveys and/or focus groups
- Develop and present a three-to-four-year strategic plan refresh including objectives and metrics.

6.0 Visit Oakville Project Team

This project is being undertaken by a Visit Oakville task force comprised of staff and board members:

- Rebecca Edgar, Executive Director, Visit Oakville
- Denisa Leiba, Director
- Julian Kingston, Director
- Philippa Durbin, Director
- Councillor Sean O’Meara, Chair of the Board

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

The Executive Director will be project lead.

The project will be completed to the satisfaction of the project team.

The project team expects open communication with the successful firm which may include meetings or updates via email, phone or online.

7.0 Proposed Schedule

The draft schedule is negotiable based on the successful firm's feedback and proposed workplan.

Task	Date
Release RFP	Monday, November 14, 2022
Proposal Submission Date	Friday, December 2, 2022
Project Evaluation	December 5 - 9, 2022
Proponent Notification and Award	By Friday December 16, 2022
Project Phase	
Kick-off meeting	By end of January 2023
Stakeholder consultation	February - March
Present overview tourism landscape	March
Present draft pillars	March
Present Strategic Plan	End of March/early April

8.0 Proposal Requirements

All proposals must include the following:

- Your understanding of the project needs
- An outline of your approach to this project
- Proposed workplan and schedule
- Expectations of Visit Oakville – what you need from us to be successful
- Description of your project lead and team members
- Examples of similar projects including references
- Cost before HST

Shortlisted candidates may be required to make a short (20-30) presentation to the project team.

9.0 RFP Submission Guidelines

The proposal must:

1. Be submitted electronically and should not exceed 10 pages in length, not including work samples.
2. Be accompanied by a cover letter and/or an email signed by an authorized representative of your organization certifying the accuracy of all information contained in the submission and acknowledging your firm's offer of services according to the terms of this RFP.

3. Be submitted no later than 5 p.m. on Friday, December 2, 2022 to rebecca.edgar@visitoakville.com

10.0 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"> • Company overview as it relates to scope of work • Identification of project lead • Team members and their experience 	10
2.	Project Experience <ul style="list-style-type: none"> • Demonstrate your firm's experience with strategic and action planning with three examples of projects 	15
3.	Project Approach and Work-plan <ul style="list-style-type: none"> • Summarize understanding of needs • Provide a work-plan of tasks and activities that will be undertaken to complete this project • Describe roles and responsibilities of team 	25
4.	Schedule of tasks and activities <ul style="list-style-type: none"> • Schedule • Approximate timing for meetings with <i>Visit Oakville</i> team 	10
5.	Project Costs and Fee Schedule <ul style="list-style-type: none"> • Total fee with separate costs for disbursements, mileage, markup on sub-consultants, excluding HST • Expect staff time and fees by staff assignment, task and activities 	20
6.	Presentation (presentations may 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.

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

We thank you for your interest in the project.