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## **Request for Proposal Consulting Services for Regional Marketing Strategy**

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### **Project and Proposal Requirements**

#### ***Section 1: Organization Background and Project Purpose***

##### **1.1 Background**

As a result of the Provincial Government's Climate Leadership strategy and subsequent plan to phase out coal fired electricity generation, which would have a detrimental economic impact on the region, a Climate Change Strategy Taskforce was formed in December 2015. The taskforce consisted of representation from the Town of Hanna, Special Areas Board and Cactus Corridor Economic Development Corporation (CCEDC). It engaged in a strategy to analyze regional assets and look for opportunities from its residents by way of a Community Action Team process. This process has identified a number of economic development initiatives including the need for a comprehensive marketing and advertising strategy.

The Town of Hanna is located in Special Areas No. 2 along Highway 9 and near Highway 36 with a population of approximately 2700 people. The Special Areas is a unique rural municipality in Southeastern Alberta administered by a Board appointed by Lieutenant Governor in Council. Its boundaries outline over 5 million acres of land and are home to almost 5000 people within three Special Areas (No. 2, 3 & 4).

Cactus Corridor Economic Development Corporation is a non-profit organization formed in November 2012 by Special Areas No. 2, Town of Hanna, Village of Youngstown and the Hanna Learning Centre to focus on economic development and growth in the region.

##### **1.2 Vision for Project**

The region and its partners need a comprehensive marketing and advertising strategy (including support and training for local staff) which will integrate with a number of specific economic development projects. As the economic development team work on attracting new opportunities to the region, we need a way to let the world know what we currently offer, that we are open for business and that the region is a great place to re-locate for both business and people. We believe that having a segmented and targeted marketing plan, focusing on specific outcomes, is paramount to the success of the regions economic future.

### **1.3 Project Purpose**

Cactus Corridor and each of its partners require a sophisticated brand, complete with modernized websites and social media content. The strategy would be tailored to each of the partners strengths and needs. Some of this work has already been completed (such as Hanna's new brand) however there is work to be done to bring each of our partners up to the same level of readiness. This project will include marketing material production that is generic in nature and promotes the entire region and its partners. Marketing materials would include items such as a video series, social media space, highway billboards, and materials for tourism booths.

### **1.4 Project Goal**

The intent of this RFP is to acquire qualified consulting services to complete a Regional Marketing Strategy, to advertise the strengths of the region to businesses and potential residents from outside the region for the purpose of attracting those entities to re-locate here.

## ***Section 2: Project Scope***

### **2.1 Project Components**

The Regional Marketing Strategy has 3 main components:

1. **Regional Destination Marketing Strategy:** development and implementation of a marketing strategy tailored to each of the three regional partners. It will promote the region as a destination with the goal of increasing tourism and eventually making visitors become residents, both personally and for business opportunities. Strategy to include a sophisticated brand complete with marketing material production (online and print media) designed to promote the region.
2. **Retire to Hanna Marketing and Development Strategy:** the goal of the Retire to Hanna project is to showcase Hanna's quality of life, amenities and access to affordable housing options. It includes 2 components: a marketing strategy targeted to the retiree demographic including cradle to grave health care options as well as infrastructure upgrades and options to support the marketing strategy (for example housing and health clinic options to attract people to re-locate to Hanna).
3. **Youngstown Affordable Living Strategy:** a marketing strategy specific to Youngstown which will highlight the opportunities available for relocation to the Village. The strategy will highlight Youngstown's quality of life coupled with existing amenities and access to affordable housing options. Strategy to include visual identity as well as online and printed material production.

### **2.2 Project Governance**

The project will be guided by Cactus Corridor Economic Development Corporation, its manager, board and as needed a project team made up of local stakeholders and project champions. The successful proponent will report to the CCEDC manager.

The manager and associated team will also act as a source of expertise for and feedback to the successful proponent throughout the project and will be responsible for providing feedback on each deliverable.

The successful proponent will be expected to address any concerns and ensure the approval of the manager before considering a deliverable of the project is completed satisfactorily.

## 2.3 Project Budget

This is a competitive bidding process and Cactus Corridor Economic Development Corporation reserves the right to accept a proposal other than the lowest proposal without stating reasons.

## 2.4 Expected Deliverables

1. Interviews with local officials, stakeholders and the public at large.
2. Report of findings should include data collection and analysis, including results of interviews.
3. Provide a printed copy as well as an electronic version (in pdf and word format) of the final report.
4. Presentation of findings to CCEDC and stakeholders.
5. The strategy will include branding for the region and its 3 partners including online and print materials.

Meetings and other forms of communication with CCEDC will be required from the Consultant throughout the course of this project. Contact between the Consultant and CCEDC will occur when needed, at no cost to the project Sponsors.

## 2.5 Timeline

In order to assist Proponents, the following are the Key Dates and Events with respect to this RFP process. Such dates are negotiable and may change based upon circumstances, without notice.

<b>Deliverables</b>	<b>Timelines</b>
RFP issued	August 1, 2020
Response to RFP required	September 15, 2020
Proponent selected	By October 15, 2020
Initial meeting, presentation of work plan, methodology, scope of project	By Nov 15, 2020
Stakeholder engagements	Late 2020 & Early 2021
Data Collection and analysis; interim report	Middle 2021
Presentation and final Report	Middle to later 2021

## 2.6 Payment Schedule

Please advise within proposal as to the required payment terms.

## ***Section 3: Submission Format and Requirements***

### 3.1 Cover Letter

Proposals must include a cover letter signed by an authorized official.

### 3.2 Corporate Information

Proposals must include a description of the proponent's background with particular emphasis on previous experience managing similar projects and relevant expertise.

### **3.3 Technical Proposal**

The Consultant must supply a complete outline that clearly demonstrates understanding of the purpose and objectives of the project and proposes how the objectives will be achieved and how the deliverables will be completed.

It will also include the following:

- a) Consultant's understanding of the project purpose, objectives, and scope
- b) Consultant's proposed approach and methodology, the merits associated with this approach, and a suggested work plan outlining the project phases and milestones
- c) Identification of any assumptions upon which the proposal is based
- d) Consultant's willingness and ability to comply with all Terms and Conditions as outlined in this RFP
- e) References from clients on similar work

### **3.4 Project Staff and Qualifications**

The Proposal must include the following information regarding the project team:

- a) A detailed resume for each professional, including:
  - i. Description of capabilities and related qualifications
  - ii. Previous work assignments and training in any relevant area of expertise
- b) In the event the Consultant intends to utilize the services of additional individuals on a sub-contracting basis, to perform selected aspects of this project, the overall coordination and responsibility for the Proposal must be assumed by the Consultant and the Consultant is deemed solely responsible for all incurred costs related to sub-Consultants. The Consultant and any of their agents or sub-Consultants must meet all regulatory requirements as outlined by both provincial and federal acts and regulations, pertaining to labour, health and safety and taxation laws.

All sub-Consultants must be identified in the proposal along with the associated services they will provide. Cactus Corridor Economic Development Corporation reserves the right to accept or reject any sub-Consultant.

### ***Section 4: General Terms and Conditions***

All terms and conditions, as outlined in this RFP, must be clearly reflected within the Proposal. In instances where the Consultant is unable to meet any of the terms and conditions and deliverables as outlined, specific notation must be clearly expressed within the contents of the written Proposal document.

#### 4.1 Submission and Closing Date

All submissions should be submitted no later than 4:30 pm on **September 15<sup>th</sup>, 2020** Alberta time.

<b>Information Requests and Proposal Submission to:</b>	<b>Closing Date:</b>
Mark Nikota Economic Development Manager Cactus Corridor Economic Development Corporation P. O. Box 1255 203-2 <sup>nd</sup> Ave West Hanna, Alberta T0J 1P0 Phone: (403) 854-0589 Email: mark.nikota@cactuscorridor.com	<b>September 15, 2020 @ 4:30 pm AB time</b> RFP Title and Closing Date are to be marked on sealed envelope if quote is mailed or couriered, or in the Subject Line if quote is emailed.

#### 4.2 Conditions of Proposals Received

Any proposal received after the specified closing date and time will not be considered.

The consultant or contracting organization which proposes to contract with CCEDC is referred to as the Consultant. If the Consultant discovers an error or omission in their proposal, they can withdraw their proposal up to two (2) hours before the proposal closing date; otherwise their proposal is binding as submitted.

All proposals submitted shall be open for acceptance and are irrevocable for a period of sixty (60) days from the proposal closing date.

**Cactus Corridor Economic Development Corporation reserves the right not to accept any of the proposals submitted and can re-open competition for this contract.**

#### 4.3 Acceptance or Rejection of Proposal

The Consultant is expected to enter into a contract within ten (10) working days of the notification date of acceptance by Cactus Corridor Economic Development Corporation of their proposal.

#### 4.4 Proposal Return

The proposal and accompanying documentation submitted by the Consultant becomes the property of Cactus Corridor Economic Development Corporation and will not be returned.

#### 4.5 Proposal Alteration

Proposals submitted shall be final and may not be altered by subsequent offering, discussion, or commitments without the mutual consent of both parties in writing.

#### 4.6 Period of Commitment

All Proposals must be firm for a period of at least 90 (ninety) days from the RFP closing date and will be used by Cactus Corridor Economic Development Corporation as the basis for any formal Contract.

#### **4.7 Proposal Rejection**

Cactus Corridor Economic Development Corporation may reject any or all Proposals or cancel this RFP at any time.

#### **4.8 Modification of Terms**

Cactus Corridor Economic Development Corporation reserves the right to modify the terms of this RFP at any time at its sole discretion.

#### **4.9 Incurred Costs**

Cactus Corridor Economic Development Corporation shall not be liable for any costs for preparation or presentation of proposals by the Consultant.

#### **4.10 Questions**

All questions related to this RFP shall be directed to the contact on the RFP cover sheet in writing or via email. Enquiries and responses will be recorded and may be distributed to all vendors at the discretion of Cactus Corridor Economic Development Corporation. Verbal responses to any inquiries are not binding to either party.

#### **4.11 Confidentiality**

Information obtained by the Consultant as a result of participation in relation to this RFP is confidential and must not be disclosed by the Consultant except as authorized by Cactus Corridor Economic Development Corporation.

#### **4.12 Intellectual Property**

All intellectual property and reports created or acquired from this project remain the property of Cactus Corridor Economic Development Corporation and will not be returned.

#### **4.13 Authority**

Cactus Corridor Economic Development Corporation is the sponsor and project manager of this project. Cactus Corridor Economic Development Corporation at its sole discretion shall have the final approval or rejection of the project deliverables and any and all negotiations with the Consultant.

If the Consultant is not meeting the terms of the project contract, Cactus Corridor Economic Development Corporation reserves the right to discontinue the Consultant's work at each and any stage of the project.

#### **4.14 Taxation**

GST must be identified separately in the proposal.

#### **4.15 Licensing**

Dependent upon the status of the Consultant's mode of business operations, the Consultant must be legally allowed to practice business in the Province of Alberta.

#### **4.16 Contractual Warranties**

The Contract will be governed by the Laws of the Province of Alberta.

All documents, records and information gathered in the course of completing the Contract will remain the exclusive property of the Cactus Corridor Economic Development Corporation.

The Consultant, its agents and employees will be required to maintain the strictest confidence concerning any and all information pertaining to this Contract.

The Contract shall not be assigned by the Consultant under any circumstances.

The Consultant shall indemnify and hold harmless Cactus Corridor Economic Development Corporation from any and all third party claims, demands, actions and costs whatsoever that may arise directly or indirectly out of any act or omission of the Consultant, the Consultant's employees or agents, the performance by the Consultant of the Contract, including any losses, breaches of security, unauthorized disclosure of information or unauthorized use of records or information.

The Consultant's Proposal will form an official part of the formal Contract by virtue of its attachment to the negotiated Contract document. Claims made in the Proposal will therefore be considered by all parties as contractual warranties. Any provisions in the attached Proposal may also be duplicated in the Contract as a direct provision.

In the event of any inconsistency between the accepted Consultant's Proposal, the original RFP and the signed Contract, the Contract will take precedence.

## ***Section 5: Evaluation of Responses***

### **5.1 Criteria for Evaluating Proposals**

- Demonstrated understanding of project goals, objectives and scope
- Quality, expertise and accessibility of personnel assigned to the project
- Quality of business case
- Ability to start work immediately and have it completed by the defined deadline
- Recommendations from prior clients (including list of references) for whom the Bidder has performed similar studies
- Projected costs in labor and materials for completing the project

### **5.2 Award or Rejection of Bid**

Any award made is subject to a signed Contract. If a Contract between the Consultant and Cactus Corridor Economic Development Corporation cannot be negotiated in a timely fashion to Cactus Corridor Economic Development Corporation's satisfaction, the award may be withdrawn.

Cactus Corridor Economic Development Corporation reserves the right to withdraw the award at any time for any reason during the Contract negotiation process. If the successful bidder is unable to fulfill the terms of the Contract, Cactus Corridor Economic Development Corporation will take appropriate action, which may include awarding the contract to an alternate Bidder.