

REQUEST FOR PROPOSALS

RFP-MCC-2002

TOURISM BRAND, MARKETING STRATEGY, AND WEBSITE

Closing March 18th at 2:00 PM



MUNICIPALITY OF CUMBERLAND

UPPER NAPPAN SERVICE CENTRE

1395 BLAIR LAKE ROAD, RR # 6

AMHERST N.S B4H 3Y4

1. INSTRUCTIONS TO PROPONENTS (companies or persons submitting Proposals)

The Municipality of Cumberland will be receiving proposals no later than 2:00 PM March 18th, for **RFP-MCC-2002- TOURISM BRAND, MARKETING STRATEGY, AND WEBSITE**. Please include one (1) hard copy and one electronic copy of the proposal. Proposals are not to exceed 12 pages excluding appendices. Proposals must be delivered in a sealed envelope clearly marked "**RFP-MCC-2002- TOURISM BRAND, MARKETING STRATEGY, AND WEBSITE**" to the following address:

*Municipality of the County of Cumberland
Upper Nappan Service Centre
1395 Blair Lake Road
Upper Nappan, NS B4H 3Y4
Attention: Stephanie Moreau, Tourism Development Officer*

There will not be a public opening of the proposals received.

It is the responsibility of each Proponent to ensure their Proposal arrives on time. Any late Proposals may not be accepted. Proposals may be withdrawn at any time prior to opening.

All materials submitted become the property of the Municipality of Cumberland and will not be returned to the submitting Proponent. Any restrictions on the use of the data contained within the proposal materials must be clearly stated in the Proposal itself. The Municipality is not liable for any costs incurred by Proponents prior to issuance of a fully executed contract.

The Municipality of Cumberland reserves the right to waive technicalities or minor (in the sole opinion of the Municipality of Cumberland) non-compliance, to reject any or all Proposals, or any portion thereof, to advertise for new Proposals, to proceed to do the work otherwise, or to abandon the work, if in the best interests of the Municipality of Cumberland.

The Municipality of Cumberland reserves the right to request clarification of information submitted and to request additional information if required. All costs associated with the preparation of a Proposal and any supplemental information shall be borne solely by the Proponent, and shall not be passed on to the Municipality under any circumstances.

Evaluation of Proposals will not be confined to price only. The successful Proponent will be the one who's Proposal is judged to best serve the interests of the Municipality of Cumberland.

Any Addendum (corrections, changes, additions, or clarifications) will be posted on the Municipality of Cumberland's website. No other notification of any such Addendum will be provided. Prospective Proponents should check the website prior to submitting their proposal.

2. BACKGROUND

The Cumberland region occupies an area of 4200 km² of mainland Nova Scotia and is the only land entrance to Nova Scotia. It is composed of three municipal units – the Municipality of Cumberland, the Town of Amherst, and the Town of Oxford – together, referred to as the Municipalities.

The Municipality of Cumberland is comprised of many communities; including Pugwash, Joggins, and Advocate. Although small, these communities are distinct and possess their own unique identities. For instance, Joggins Fossil Cliffs has been designated a UNESCO World Heritage Site, while Pugwash is home to the renowned Thinkers' Lodge National Historic Site, and the Globe and Mail highlighted Advocate Harbour as one of five hidden vacation gems from across Canada. In recent years, the Town of Springhill and the Town of Parrsboro both dissolved, becoming communities within the Municipality of Cumberland.

The Town of Amherst is the largest regional centre in the Cumberland region, with a population of 9,555. Amherst is known for its historic architecture and charming downtown area, and for the festivals and events it hosts throughout the year, including the annual Nova Scotia Fibre Arts Festival

Oxford is located in Cumberland County, Nova Scotia with a population of 1,190. Oxford is just minutes off the Trans Canada Highway and is centrally located between the two airports of Moncton and Halifax and fifteen minutes from the beautiful Northumberland Shore beaches. It is officially recognized as the Wild Blueberry Capital of Canada, home to the world's largest processor of wild blueberries. The Trans Canada Trail passes through the town and Oxford and is recognized for its excellent multi use trails. Oxford is also known for the confluence of three rivers, River Phillip, Black and Little Rivers providing excellent fishing for Atlantic salmon, brown trout, sea run trout and speckle trout as well as kayaking, canoeing and general boating.

The Municipalities have partnered to take a unified approach to the growth and development of the tourism sector in our area, which we're calling the Cumberland region. From May 2018 to June 2019, the Municipalities worked collaboratively with tourism industry stakeholders to produce the Cumberland Region Tourism Development Strategy (the CRTD Strategy). The Municipalities generally followed the process outlined in the "Guide to Community Tourism Planning in Nova Scotia" to develop the CRTD Strategy. The CRTD Strategy was developed to align with regional and provincial goals and strategies related to tourism and economic development.

It is important to recognize that the Municipalities' vision and goals include increasing tourism revenues by attracting higher yield visitors that will stay longer rather than by attracting a higher overall number of visitors. We aim to achieve a balance between increasing tourism revenues to grow our economy and enjoying and protecting our natural environment. Sustainable tourism practices that celebrate and respect the culture, history, and natural environment will be vital to the success of the Cumberland region.

The CRTD Strategy specifies the Cumberland region priority target audience as the following three Explorer Quotient® (EQ®) explorer types: cultural explorers, authentic experiencers, and free spirits from Atlantic Canada, Ontario, and Quebec. The CRTD Strategy defines the vision for tourism in the region as "to be recognized as a four-season tourism destination through facilitating the development, enhancement, preservation, and collective marketing of our natural, historic, and cultural assets, leading

to an improved economy and quality of life.” The overall goal, as stated in the CRTD Strategy, is to increase “pleasure visitors” length of stay within the region by two days to an average length of stay of 8.3 days and to increase annual tourism revenues in the Cumberland region by \$27 million by 2024. To reach this goal, the CRTD Strategy outlines the following five objectives:

1. Collaborative tourism leadership structure
2. Branding and marketing
3. Sustainable tourism asset development
4. Communication, engagement, and outreach
5. Extend shoulder season and develop winter

The CRTD Strategy vision, goal, and objectives will be achieved through a collaborative approach undertaken by the Municipalities, the tourism industry operators, and other partners. The CRTD Strategy outlines an action plan to be implemented over the next three years. One of the first action items in the CRTD Strategy is to develop a tourism brand strategy and visual identity, create a tactical-level marketing strategy, and to design and develop a tourism-specific website.

The annual budget for implementation of the tourism marketing strategy will be:

Municipality	Implementation Budget	Staff time for Implementation
Municipality of Cumberland	\$ 30 000	50% of the Tourism Development Officer
Town of Amherst	Tourism marketing and advertising budgets currently exist and will continue	10% of the Business Development Officer 30% of the Culture & Events Coordinator
Town of Oxford	\$1200	3 hours/week

*FTE is full time equivalent

3. INVITATION

The Municipality of the County of Cumberland, in partnership with the Town of Amherst and the Town of Oxford, invites qualified service providers to submit proposals to create a tourism brand strategy and visual identity for the Cumberland region, to develop a tactical-level tourism marketing strategy for the Cumberland region, and to design and develop a tourism-specific website for the Cumberland region.

4. SCOPE OF WORK

The scope of work for this project includes three distinct portions of work: development of a tourism brand strategy and visual identity, creation of a tactical-level tourism marketing strategy, and the design and development of a tourism-specific website. The expected scope of work for each portion is described in further detail in Schedule A.

5. DELIVERABLES

The successful Proponent will complete the following deliverables, as described in the “Scope of Work” and Schedule A:

1. A tourism brand strategy and visual identity for the Cumberland region
2. A tactical-level marketing strategy for the Cumberland region
3. Design and development of a tourism website for the Cumberland region

6. SUPPLEMENTAL INFORMATION AVAILABLE

The following reports and information are available for reference. To receive digital copies of these documents, please visit the websites and links below.

- a) Cumberland Region Tourism Development Strategy- <https://www.cumberlandcounty.ns.ca/899-cumberland-region-tourism-strategy/file.html>
- b) Cumberland region tourism asset inventory- <https://cumberlandcounty.ns.ca/rfp-and-tenders.html>
- c) Driving Export Revenue 2017-2022 Strategic Plan- <https://tourismns.ca/sites/default/files/Driving%20Export%20Revenue%20-%20Strategic%20Plan.pdf>
- d) Tourism Nova Scotia research- <https://www.tourismns.ca/research/explorer-quotient>
- e) Town of Amherst Community Economic Profile https://amherst.ca/index.php?option=com_docman&view=download&alias=3052-2018-community-profile-booklet-small&category_slug=community-and-economic-development&Itemid=329
- f) Cape d’Or Master Plan- <https://www.cumberlandcounty.ns.ca/capital-projects/800-cape-d-or-master-plan/file.html>
- g) Pugwash Waterfront Development Master Plan- <https://www.cumberlandcounty.ns.ca/news/737-pugwash-waterfront-development-final-report-combined/file.html>

7. PROJECT TIMELINE

The Municipality’s proposed start date for this project is April 6th. The successful Proponent will be retained to complete all work outlined in this RFP within an estimated 8 month period, with a desired completion date of December 7th. Proposal must include a firm timeline for completing the work.

8. LEVEL OF EFFORT

A maximum budget of \$167 808 (excluding HST) has been set for all work outlined in this RFP. Proposals that exceed this budget will be rejected.

9. PROJECT MANAGEMENT (MUNICIPALITY OF CUMBERLAND)

Overall project management for this project will be undertaken by the Municipality of Cumberland on behalf of the Municipalities. As such, invoices will be sent to and paid by the Municipality of Cumberland

and any contracts will be signed by the Municipality of Cumberland. Day to day information and direction will be provided by the Tourism Development Officer for the Municipality of Cumberland. In addition, a number of briefing and working sessions with a Steering Committee comprised of Municipal and stakeholder representatives shall be held throughout the duration of the project. Proposals must contain a commitment to the number of briefing and working sessions the Proponent believes are required.

10. PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated and selected based upon the following criteria:

- a) Understanding of the Project (15%):** This section of the proposal shall demonstrate the Proponent's understanding of the project objectives and the work to be done.
- b) Proposed Approach and Schedule (25%):** This section of the proposal shall outline the project approach for each of the project components, in consideration of the "Scope of Work" and "Deliverables" sections of this RFP. The Proponent shall provide a detailed, well-conceived work plan showing the methodology and approach to be used to successfully accomplish the project within the project timeline outlined in this RFP. The proposal shall include a detailed schedule and timeline for the completion/delivery of all deliverables, which are based on the Scope of Work section.
- c) Proponent Qualifications and Experience (35%):** The proposal must demonstrate the Proponent's competence to perform the requested work as evidenced by technical education, training, and experience in providing the requested services. Resumes and experience of principle staff to be utilized in this contract shall be submitted, with their role, time commitment, and hourly rate identified. The Proponent shall also indicate whether the services of a specialty consultant(s) or subcontractor(s) will be involved in the project.
- d) References (15%):** Provide no less than three (3) references of private persons, clients, and officials of government agencies that have retained the services of your firm. The Proponent is encouraged to include reference letters from clients explaining the Proponent's accomplishments, preferably with comparable projects completed in the last three years.
- e) Value for Money (10%):** The proponent shall provide total costs associated with the work based upon the proposal's tasks, deliverables, and timeline. Deliverables and costs may be negotiable with the selected Proponent, based upon final scope of work, timetable, and needs of the Municipalities.

11. CONTACT FOR QUESTIONS

Any questions concerning this RFP are to be directed by email only no later than 10:00AM March 11th 2020 to:

Kellie Seaman
Recruitment and Procurement Officer
Municipality of Cumberland
kseaman@cumberlandcounty.ns.ca

Answers to submitted questions will be posted on the Municipality of Cumberland's website by 2:00PM March 12th. Any information a Proponent may obtain from any source other than this RFP or the above-named contact will not be binding on the Municipality or the Municipalities.

SCHEDULE A: Scope of Work Detail

Scope of Work: Tourism Brand Strategy & Visual Identity

1. Tourism Brand and Visual Identity Development Research, which will include:

- i. Brand and Visual Identity Audit Review** – Existing tourism-related brand and marketing materials from all three Municipalities will be provided to the successful Proponent by the Municipality of Cumberland.
- ii. Discovery/Research** – The successful Proponent will be expected to complete market research to gain insight into the tourism brand and visual identity for the Cumberland region, including research and consultation with the target audiences. The successful Proponent is encouraged to become familiar with the communities and stories in the Cumberland region.

2. Tourism Brand Strategy and Visual Identity Design and Guidelines, which will include:

Note: The Municipalities recognize that the Cumberland region is separated into two distinct Tourism Nova Scotia regions (*i.e. the Fundy Shore/Annapolis Valley Region and the Northumberland Shore Region*). We also recognize that the best path forward for us *could* be to adopt two brands that align with the Tourism Nova Scotia regions and our CRTD Strategy.

- i. Brand Name** – We recognize the brand name is a vital part of our brand. Although Cumberland region has been used throughout this document, the appropriate brand name must be determined.
- ii. Brand Positioning** – The Proponent will develop the tourism brand messaging and language to be used for the Cumberland region, including how the region presents itself and how the region's tourism assets are described and identified. As part of this process, a document will be produced for internal purposes to clarify tourism brand positioning by identifying, at minimum, the tourism brand essence, tourism brand promise, key tourism brand messages, tourism audience perceptions, competitive position, brand voice, and brand tone.
- iii. Brand Hierarchy** – The region's tourism brand will be the primary brand for promoting the region as a destination. Under that primary tourism brand, there may be a need for sub-brands for individual areas/communities. These sub-brands need to be consistent with the primary tourism brand, and the Proponents will be expected to provide recommendations on how best to accomplish this.
- iv. Visual Identity Design** – The Proponent will create a tourism brand visual identity based on the CRTD Strategy and the knowledge obtained through the Proponent's research process. The Municipalities' preference is to present to the Project Steering Committee a set of three (3) options that clearly and creatively reflect and present the Cumberland region for the proposed brand or for each of the proposed brands. The committee will choose one option for the proposed brand or for each of the proposed brands, which will be refined.
- v. Visual Identity Guidelines** – The tourism visual identity guidelines document will specify, articulate, and depict the defining elements of the visual identity and provide examples for marketing communications materials. At minimum, the following items are to be included:
 - Tourism visual identity creative parameters (*i.e. fonts, design styles, photo styles, colour palette, logo, etc.*)
 - Acceptable and unacceptable uses of the tourism visual identity

- Permission guidelines for use of tourism visual identity
- Samples of how the tourism visual identity will be applied

Scope of Work: Tactical-Level Marketing Strategy

The successful Proponent will use an innovative approach to industry best practices to generate a four-year tactical level marketing strategy to promote the Cumberland region. The marketing strategy will focus on contributing to the region's goal to increase the visitor's length of stay in the region by two days resulting in the average length of stay by "pleasure visitors" to 8.3 days and increase tourism revenues by \$27 million by 2024. The tactical level marketing strategy should reflect the brand.

The marketing strategy is expected to focus on achieving the following three priorities:

1. Reach the Cumberland region identified target audiences during their travel planning process;
2. Help the target audiences plan their trip; and
3. Define the visitor's path-to-purchase.

The marketing strategy will determine specific tourism products and experiences to be included in marketing efforts as well as the criteria used to make those decisions. The specific products and experiences to be marketed need to strike an appropriate balance between the target audience desires and the community interests.

All tactics included in the marketing strategy will be ready to implement with fully developed content and timelines. The strategy will include measurement and evaluation metrics.

Scope of Work: Tourism-Specific Website Design and Development

Our desire is to be as non-prescriptive as possible regarding how the successful Proponent will develop a marketing strategy for the region. However, the Municipalities anticipate a website will be required to augment the marketing strategy and we are therefore requesting upfront that a website will form part of the required work for this project. We expect the successful Proponent to use an innovative approach to industry best practices to design and develop a tourism-specific website for the Cumberland region. The website should reflect the new brand and visual identity for the region and should be designed to enhance and strengthen the tactical-level marketing strategy.

Municipal staff should have appropriate access to update the website on a go-forward basis. The content management system chosen for the website should be user friendly, allowing ease of use for Municipal staff.