



REQUEST FOR PROPOSAL

Tourism Burlington

STRATEGIC PLANNING SERVICES

**RFP Issue Date:
June 25th, 2021**

Closing Date and Time:

Proposals must be received by Tourism Burlington prior to:

5:00 PM on Friday July 16th, 2021

Contact:

Kristene Smith, Executive Director
Tourism Burlington

kristene.smith@burlington.ca or 905.634.5594 x 7241

1. Introduction

Tourism Burlington is a not-for-profit organization and the official Destination Marketing (Management) Organization for the City of Burlington and its surrounding area. Tourism Burlington is mostly funded by the City of Burlington with incremental funds generated from partner advertising, restaurant programs, and souvenirs sold through our Visitor Information Centre.

We serve more than 1,800 tourism businesses providing more than 24,000 direct jobs. In 2019 we served more than 15,900 visitor inquiries at our Visitor Information Centre, 16,000 through our information mobile, and 3,700 at festivals and events.

Our core services include the annual visitor guide with a distribution of 50,000 at more than 100 Ontario and regional visitor centers as well as through our partners and businesses, tear maps for easy navigation to visitors, a tourism website with blogs and itinerary support, printed materials, and media relations. The Visitor Information Centre serves the community and tourists with a large assortment of maps, visitor guides, referrals, and souvenirs. We also support sports tourism, leisure travel, meeting and convention business, culinary tourism, and group tours.

Burlington offers a broad range of unique experiences from the tranquility of the escarpment and waterfront trails, to vibrant downtown cores, shopping centres, a variety of accommodations, a growing culinary scene, cultural heritage sites, museums, art galleries, the Royal Botanical Gardens, premier golf courses, and large festivals and events.

Vision: Burlington is seen as a distinctive waterfront destination known for its culture, festivals and outdoor experiences, and tourism is recognized as an economic driver.

Mission: Tourism Burlington is a partnership that facilitates: increased visitors, year-round; economic benefits to the community and partners; quality visitor experiences.

2. Invitation:

Tourism Burlington is seeking proposals from qualified proponents for the development of a new three-year tourism strategy. The current plan was refreshed in 2016 and it lacks key process objectives to meet the changing needs of tourism. Our current strategic plan concluded in 2020 and with the worldwide impact from the COVID-19 pandemic, the work to re-develop the strategic plan was paused for a year. The newly developed plan will address the current tourism environment and provide tools for managing the destination through social and economic recovery.

3. Scope of Work & Objectives

The objective for this request for proposal is to select a qualified proponent to provide external facilitation with the board, staff, and stakeholders to develop a multi-year strategic plan. The successful proponent will work with the Executive Director to coordinate the timelines for the project and they are responsible for the delivery of a final strategic plan which must include the following key service functions:

- an overview of the destination with a clear mission, vision, and a set of values for the organization;
- conclusions and recommendations from an extensive environmental scan;
- key issues, gaps, and objectives as identified from scan and consultations (strategic imperatives);

- execute and analyze partner and stakeholder survey data;
- stakeholder consultations (one-on-one), a single day board workshop, and one focus group with selected tourism partners, both providing a full SWOT analysis;
- a critical path (strategies, tactics, initiatives, and measures) for the implementation and execution of the strategic objectives;
- recommended targets for performance measures, based on stakeholder engagement.

The newly developed strategy needs to address additional funding that will begin in late 2022 from the Municipal Accommodations Tax (MAT). The funds are expected to double the current annual budget. The baseline metrics need to include focused delivery of services in areas that have been paused over the past several years in the absence of Destination Marketing Funds (DMF). Core areas that were reduced or eliminated are meetings and conference sales, leisure travel incentives, public relations, full-scale advertising campaigns. Tourism Burlington also seeks to provide recommendations to the municipality for their portion of MAT, to complement the activities undertaken by tourism and best serve businesses in Burlington.

4. **Timelines:** Please provide estimated timelines for the committee’s evaluation. The recommendations below are **ONLY** a guideline.

	Date	Comments
Start Date	August 2021	Meet with Executive Director & Executive
Phase 1	Late-August 2021	Survey to partners/public, environmental scan
Phase 2	September 2021	Board, Stakeholder and Partner consultations, SWOT. Review operational, marketing needs with Executive Director.
Phase 3	October 2021	Develop the plan, review with Executive Director, then the Executive
Phase 4	Late-October 2021	Revisions, review with Board of Directors
Phase 5	November 2021	Final Plan presented to Board of Directors
Completion Date	December 2021	Approval and Adoption of Strategic Plan

5. Proposal Evaluation

Tourism Burlington’s Board of Directors will appoint a procurement committee to review and evaluate all proposals, and if appropriate, request the proponent present their proposal in person.

Evaluation of responses will be based, in part, on the following criteria and qualifications of the proponent, including:

- 25%: Demonstrated project understanding and methodology. Response to RFP requirements must be complete. Proponents must demonstrate in their proposal that they have a clear understanding of this project. Proponents need to articulate their proposals, intentions, and expectations, indicating how they will fulfill the requirements of the RFP and what services they will provide.
- 35%: Experience of the proponent and the proposed project team members with projects of similar size and complexity, including experience with tourism destinations of similar size. Appropriate

expertise should be provided by the project team members in their proposed respective roles. The proponent needs to have demonstrated logistical skills to successfully develop a fulsome plan.

- 20%: Time-lines/Proposed fee structure. A work plan, detailing all suggested steps in the process with an estimate of time and personnel required to complete each step should be provided. Availability and commitment of proposed project team members during the required time frame and information on backup personnel at appropriate organizational levels to be given. Proposals to provide options for various levels of industry stakeholder consultations, including time-frames and costs involved with a single-day workshop for the Board of Directors and 2-4 hours workshop for industry partners.
- 20%: References/Interviews. After an initial review of the proposals, a proponent shortlist may be created at Tourism Burlington's sole discretion and references checked and interviews conducted. Interviews and reference checking will provide an opportunity for Tourism Burlington and the potential proponents to further gauge their fit and ability to work with each other. Proponents must provide a minimum of three (3) references that demonstrate successful competency with comparable work for similar clients. Provide a brief description of the project, the timelines, and all relevant reference contact information. Alternatively, if one proponent clearly demonstrates they are the leading proponent, after the reference check, Tourism Burlington retains the option of bypassing the interview process and proceeding directly to the award stage.

Instructions for Proponents

Cover Letter & Signature

The proposal should include a cover letter signed by a person authorized to legally bind the proponent to the statements made in the response to this RFP.

Delivery of Proposals

1. Proposals shall be received for one of the following two (2) methods:
 - By hand/courier delivery: Four (4) hard copies of the Proposal should be enclosed and sealed in an envelope clearly marked: **"TOURISM BURLINGTON STRATEGIC PLAN SERVICES"** along with one (1) electronic version on a USB flash drive delivered and addressed to the Tourism Burlington (address below)
 - By Email: At the only acceptable electronic address: Kristene.smith@burlington.ca. Please note: Maximum email file size limit is 8MB or less.
2. Tourism Burlington will not be liable for any delay for any reason including technological delays, spam filters, firewalls, job queue, file size limitations, etc. It is the proponent's sole responsibility to ensure they allow themselves enough time to submit their Proposal before the posted closing date and time.
3. Submit three references with the quote, preferably tourism-related business, within the past three years. Include the name of the organization/business, contact name, phone number, and email for which you provided professional services.
4. Please include a summary of timelines required for consultation and reporting.
5. The Tourism Burlington and a committee of individuals selected by the Board shall review and evaluate all proposals, and if appropriate, request a preliminary concept

6. It is the sole responsibility of the Proponent to submit their Proposal to the Tourism Burlington before closing time. All proposals must be sealed and must be received by 5:00 PM on Friday, July 16th, 2021. Mail proposal and qualifications to:

Kris Smith, Executive Director
Tourism Burlington
414 Locust Street
Burlington, ON L7S 1T7
Kristene.smith@burlington.ca

7. Proposals received by facsimile WILL NOT be accepted. All costs to prepare the Proposal shall be borne solely by the proponent.
8. In preparing submissions, proponents should describe in detail the services proposed to be provided and how service delivery will be accomplished. Proponents should also identify costs that could be incurred through the consultation. The minimum levels of services to be provided are described in this RFP.
9. It is the responsibility of the business to request more information or any clarification prior to the quoted due date. All questions regarding this RFP must be submitted to kristene.smith@burlington.ca.

Proposals will not be accepted after Friday, July 16th, 2021 at 5:00 PM

General Terms and Conditions

Amendment to Proposals

Proposals may be amended in writing and delivered to the closing location before the closing time but not after. Such amendments should be signed by the authorized signatory of the Proponent and either hand-delivered or emailed to the Executive Director.

Addendum

If Tourism Burlington determines that an amendment is required to this RFP, Tourism Burlington will send an electronic copy of the written addendum to each of the invited proponents. Each addendum will be incorporated into and become part of the RFP. No amendment of any kind to the RFP is effective unless it is contained in a written addendum issued by Tourism Burlington.

Withdrawal of Proposals

The Proponent may withdraw their Proposal at any time prior to the Proposal closing time by submitting a written withdrawal letter to Tourism Burlington.

Local Preference

Preference shall be given to local suppliers where quality, service, and price are equivalent.

Irrevocability

All Proposals are irrevocable for a period of (60) business days from the closing date.

Negotiation

Tourism Burlington reserves the right to negotiate enhancements or changes to the preferred Proposal with the proponent.

Right of Tourism Burlington to Cancel the RFP Process

Tourism Burlington is not bound to select a preferred Proponent or accept any Proposal and reserves the right in its sole discretion to postpone or cancel this RFP at any time for any reason whatsoever in accordance with the Tourism Burlington's judgment of its best interest and to proceed with the Services in some other manner separate from this RFP process.

Conflict of Interest

Proponents shall disclose in their Proposals any actual or potential Conflict of Interest and existing business relationships it may have with Tourism Burlington, its Board of Directors, or employees.

Solicitation of Board Directors

Proponents and their agents will not contact any member of the Tourism Burlington Board of Directors with respect to this RFP, other than the Tourism Burlington Representative named in this document.

Ownership of Proposals

All documents, including proposals, submitted to Tourism Burlington become the property of the association. They will be received and held in confidence by Tourism Burlington, subject to the provisions of the Province of Ontario's Freedom of Information and Protection of Privacy Act.

Governing Law

This agreement shall be governed by the laws of the Province of Ontario.

Dispute Resolution

In the event of a dispute arising between Tourism Burlington and the Proponent as to their respective rights and obligations under the Agreement, both parties agree to resolve the dispute by:

- Frank and open negotiations whereby both parties use their best efforts to resolve the dispute by mutual agreement including the most Senior Management of both parties;
- If, after 30 calendar days, the dispute is not resolved, both parties agree to appoint a mediator to resolve the dispute. All costs to be split equally;
- If, after the mediation process is complete and the dispute is not resolved, the parties shall proceed to arbitrations following the rules of procedures as per the laws of the Province of Ontario. All costs, except for legal fees shall be borne equally.

Additional Information

The proponent will be selected that best fulfills Tourism Burlington's requirements and represents the best value to the membership. No single factor will determine the final contract award decision.

When a proposal has been accepted by the Tourism Burlington Board of Directors, contract negotiations will begin to determine contract terms. If a contract cannot be negotiated for any reason, another provider may be selected.