



Town of Canmore Tourism Task Force

Request for Proposal (RFP)

FOR

Tourism Consulting and Stakeholder Engagement Services

SUMMARY:

The Town of Canmore's Tourism Task Force is seeking a qualified consultant to work with them to lead a robust community engagement process that generates broad-based and meaningful conversations regarding tourism and its role in Canmore and impacts on the town and its residents. This process will lead to a shared understanding and will define a comprehensive and balanced triple bottom line framework for tourism and the tourism industry in a way that:

- Preserves the social fabric of the community,
- Maintains and where possible enhances ecological integrity,
- Continues to ensure Canmore's long-term economic health, and
- Provides stakeholders with the opportunity to contribute to the tourism framework.

REFERENCE NUMBER:	Project 7165
CLOSING DATE:	Friday, February 5, 2021
CLOSING TIME:	14:00:00 Mountain Time Zone
DATE ISSUED:	Friday, January 15, 2020
NOTE:	RESPONSES WILL NOT BE OPENED PUBLICLY

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1.0 INSTRUCTIONS FOR RESPONDING TO THIS REQUEST FOR PROPOSALS

- 1.1.1 Responses should be addressed to:
Town of Canmore
902 7th Ave.
Canmore, AB T1W 3K1
Attention: Lisa de Soto, Chief Administrative Officer

Proponents shall submit their proposal to the Town of Canmore by email to the attention of Lisa de Soto, Chief Administrative Officer at lisa.desoto@canmore.ca.

Closing Date and Time: Proposals must be received not later than 14:00:00 hours Mountain Time Zone (Canmore local time) on Friday February 5, 2021.

- 1.1.2 Electronic RFP responses are to be in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission.
- 1.1.3 RFP Contact Person:
For clarification or additional information, Proponents shall **only** contact the person listed below.
- Lisa de Soto, Chief Administrative Officer
Email – lisa.desoto@canmore.ca

See Section 2.0, item 2.6 below for additional information for Questions and Clarifications.

- 1.1.4 The Town of Canmore may in its sole discretion disqualify responses that do not meet the formatting and other criteria set out in Section 4.0 of this RFP.
- 1.1.5 Responses must be in English.
- 1.1.6 Pricing submissions shall be stated in Canadian dollars with Goods and Services Tax (GST) extra.
- 1.1.7 Each Proponent is solely responsible for ensuring that its response is received at the specified address (physical address or email address) by the specified closing date and time. Strict adherence to the closing date and time will be maintained, and unless the deadline date is extended by issue of Addendum, all responses received after this time and date will be returned unopened.
- 1.1.8 This Request for Proposals is not a tender and the Town of Canmore does not intend for the laws of competitive bidding to apply.

END OF SECTION 1.0

2.0 GENERAL CONDITIONS OF RESPONSE

2.1 PURPOSE OF THE REQUEST FOR PROPOSAL (RFP)

The Town of Canmore is issuing this Request for Proposal (RFP) to select a qualified consultant to work with their appointed Tourism Task Force to lead a robust community engagement process that generates broad-based and meaningful conversations regarding tourism and its role and impacts on the town and its residents. This process will lead to a shared understanding and will define a comprehensive and balanced triple bottom line framework for tourism and the tourism industry in a way that:

- Preserves the social fabric of the community,
- Maintains and where possible enhances ecological integrity,
- Continues to ensure Canmore's long-term economic health, and
- Provides stakeholders with the opportunity to contribute to the tourism framework.

The Town of Canmore reserves the right to modify the terms or cancel the RFP process at any time.

2.2 SUBMISSION OF RESPONSE TO THE RFP

2.2.1 By submitting a response to this RFP, each Proponent accepts its terms and conditions. In addition, by submitting its response each Proponent waives all claims, rights, demands and the benefit of any provisions of any statute, rule of law or regulation that might adversely affect the rights of the Town of Canmore under this RFP.

2.2.2 Each Proponent shall make full disclosure of any actual or potential conflict of interest arising from any existing business or personal relationships with any of the following (each, a "Conflicted Person"): (i) any employee of the Town of Canmore; (ii) any member of the Town of Canmore Town Council (councillor); (iii) any board or committee member; (iv) any family member of any such employee, councillor or board/committee member; or (v) any business entity controlled by or otherwise not at arm's length to any one or more of any such employee, councillor, board/committee member or family member.

Without limiting the foregoing, details should be provided of any direct or indirect pecuniary interest of any Conflicted Person in the supply of the services contemplated by this RFP.

Disclosure of any such actual or potential conflict of interest shall be made in writing with the Proponent's response.

2.2.3 This RFP and any contracts subsequently entered into as a result hereof shall be governed by the laws of the Province of Alberta and the laws of Canada applicable therein. The courts of the Province of Alberta shall have exclusive jurisdiction over this RFP and any contracts entered into as a result hereof.

2.2.4 Proposal documents must be completed in accordance with the requirements of the Request for Proposal documents and no amendment or change to proposals will be accepted after the closing date and time.

2.2.5 All documents submitted by Proponents in response to this RFP are to remain the property of the Town of Canmore.

2.2.6 Proposals shall be irrevocable for sixty (60) days following the closing of the RFP and the proposals shall be retained by the Town of Canmore.

2.2.7 Proposals shall be signed by an authorized signatory of the Proponent using the

Signature and Waiver Sheet in Section 5.0. If the Proponent is an incorporated company, the corporate seal of the Proponent shall be affixed or a certified true copy of a resolution of the corporation naming the person(s) in question as authorized to sign agreements on behalf of the corporation shall be attached to the proposal.

Proponents who are sole proprietorships or partners shall sign their RFP response in such a way as to irrevocably bind the Proponent in an authorized manner.

2.3 NO COMMITMENT

- 2.3.1** No commitment on the part of the Town of Canmore shall exist under this RFP unless and until the Proponent receives official written confirmation from the Town of Canmore that it has been selected to complete the work.

2.4 LIMITATION OF LIABILITY

- 2.4.1** The Town of Canmore will have no liability to any person or entity for any damages, including, without limitation, direct, indirect, special or punitive damages, arising out of or otherwise relating to this RFP, the Proponent's participation in this RFP process or the Town of Canmore's acts or omissions in connection with the conduct of this RFP process. This limitation applies to all possible claims by a Proponent, whether arising in contract, tort, equity, or otherwise, including, without limitation, any claim for a breach by the Town of Canmore of a duty of fairness or relating to a failure by the Town of Canmore to comply with the terms set forth in this RFP.

2.5 ACCEPTANCE OR REJECTION

- 2.5.1** The Town of Canmore reserves the right to reject any or all responses. Without limiting the generality of the foregoing, the Town of Canmore may reject any response which it deems:
- a) is incomplete, obscure, irregular, unrealistic or noncompliant;
 - b) has erasures, ambiguities, inconsistency or corrections; or
 - c) fails to complete, or provide any information required by, any provision of this RFP.

Further, a response may be rejected on the basis of the Town of Canmore's understanding of the Proponent's past record of work, its general reputation, its financial capabilities, the completion schedule or a failure to comply with any applicable law.

The purpose of the Town of Canmore is to obtain the most suitable responses to the Project and to further the interests of the Town of Canmore and what it wishes to accomplish in carrying out the Project. Therefore, the Town of Canmore has the right to waive any irregularity or insufficiency or noncompliance in any response submitted and to accept the response or responses which it deems most favourable to its interests or to reject all responses and cancel the RFP.

In addition to any rights identified elsewhere in this RFP, the Town of Canmore reserves the right to:

- a) reject any and all responses;
- b) add, delete or change the terms of this RFP at any time prior to the specified closing date and time;

- c) during the evaluation period, seek clarification of any Proponent's response, including consequential amendments, or any additional information from any Proponent;
- d) accept or reject, in whole or in part, any response without giving any reason;
- e) have any documents submitted by the Proponent reviewed and evaluated by any party, including independent Consultants;
- f) cancel the RFP process without penalty at any time for any reason; and
- g) negotiate and enter into an agreement with any Proponent notwithstanding any noncompliance by the Proponent's response with any requirement of this RFP.

The Town of Canmore is the sole and final judge with respect to the selection of any Successful Proponent as a result of this RFP process.

All Proponents submitting a response to this RFP will be advised of the results of the RFP process by email or regular mail. Please allow at least six weeks for responses to be evaluated by the Town of Canmore.

2.6 QUESTIONS AND CLARIFICATIONS

- 2.6.1** Procedural or technical questions shall be submitted in writing and should include references to a specific section and item number.
- 2.6.2** Dependent upon their nature, comments or answers will be returned via email or through an addendum should the information be applicable to all Proponents.
- 2.6.3** Amendments to this RFP will be valid and effective only if confirmed by written addenda. Addenda may be issued during the proposal response period. All addenda become part of the agreement and receipt must be confirmed in the Proponents proposal submission.
- 2.6.4** Any addenda documents will be issued by the same method that this RFP was issued.
- 2.6.5** It is the Proponent's responsibility to clarify the interpretation of any item of this RFP a minimum of 72 hours prior to the stated closing date and time by contacting the Town of Canmore's designate (as above).

2.7 DISCREPANCIES IN NUMBERS

- 2.7.1** In the event of a numerical discrepancy or error in a Proposal, the written number will prevail.
- 2.7.2** In the event of pricing extension errors, the unit price will apply.

2.8 CONFIDENTIALITY AND FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

- 2.8.1** All information including, without limitation, any technology of a proprietary or novel nature which is disclosed to a Proponent by the Town of Canmore or a third party as a representative of the Town of Canmore (which information, in addition to the confidentiality requirements hereunder, will be kept confidential by the Proponent in accordance with the terms of its disclosure by such third party) or which is otherwise obtained by the Proponent in connection with this RFP process, other than that which is common knowledge or within the public domain, is the confidential property of the Town of Canmore and must not be disclosed by the Proponent, except to duly authorized representatives of the Town of Canmore. Such confidential information or property is not

to be employed other than in connection with responding to this RFP unless otherwise duly authorized by the Town of Canmore in writing. These confidentiality provisions will remain binding obligations on each Proponent following the conclusion of this RFP process until the Town of Canmore reasonably determines that such confidential information referred to herein has become part of the public domain (other than by disclosure or use prohibited herein) and releases the Proponent from its confidentiality obligation. This requirement does not prohibit any Proponent from complying with an order to provide information or data issued by a court or other authority with proper jurisdiction or to act to correct or report a situation which the Proponent may reasonably believe to endanger the safety or welfare of the public.

- 2.8.2** The applicant acknowledges that any information or documents provided by it to the Town of Canmore may be released pursuant to the provisions of the *Freedom of Information and Protection of Privacy Act*. This acknowledgement shall not be construed as a waiver of any right to object to the release of any information or documents.
- 2.8.3** The Town of Canmore acknowledges that a Proponent's response may contain information in the nature of a Proponent's trade secrets or commercial, financial, labour relations, scientific or technical information of or about a Proponent. The Town of Canmore agrees that portions of responses to this RFP which are provided in confidence will be protected from disclosure to the extent permitted by law. The Town of Canmore is bound by the *Freedom of Information and Protection of Privacy Act* (Alberta), as amended from time to time, and all documents submitted to the Town of Canmore will be subject thereto. Each Proponent must identify appropriate parts of its response or other documents submitted to the Town of Canmore as confidential and specify what harm could reasonably be expected from its disclosure; however, the Town of Canmore may not be able to ensure that such parts will not be protected from access.
- 2.8.4** Proponents are advised that the Town of Canmore will, as necessary, be disclosing the responses on a confidential basis to its employees and advisors who have a need to know in connection with this RFP process for, among other things, the purpose of evaluating and participating in the evaluation of the responses. It is the responsibility of each Proponent to ensure that all personal information provided to the Town of Canmore with respect to the Proponent's personnel and their experience is supplied with the informed consent of such individuals and in accordance with applicable law. By submitting any personal information each Proponent represents and warrants that it has obtained the informed consent of the individuals who are the subject of such information to its collection, use and disclosure for purposes of this RFP response. Also, such individuals are agreeing to the use of such information as part of the RFP evaluation process, for any audit of the procurement process and for contract management and performance purposes.
- 2.8.5** Vendors or suppliers having access to or custody of the Town of Canmore records shall be required to comply with the provisions of the *Freedom of Information and Protection of Privacy Act*.

2.9 COST OF PREPARATION

- 2.9.1** Any cost incurred by the Proponent in the preparation of its response to this RFP shall be borne solely by the Proponent.
- 2.9.2** Shortlisted candidates may be invited to participate in an interview. The Town of Canmore will not pay for the time required or travel expenses incurred to participate in the interview.

2.10 OWNERSHIP OF SUBMISSIONS

2.10.1 All responses submitted to the Town of Canmore become the property of the Town of Canmore and shall not be returned. They will be received and held in confidence by the Town of Canmore, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. Unsuccessful Proponent submissions will be kept as record for the procurement process until two years after the date of decision for the RFP award.

2.11 CLARIFICATION FROM PROPONENTS

2.11.1 The Town of Canmore reserves the right to seek from any/all Proponents any further clarification it may require on responses submitted pursuant to this RFP.

2.12 PROPONENT PERFORMANCE

2.12.1 The selected Proponent may be evaluated throughout the course of service delivery in connection with any specific work or projects undertaken as a result of any agreement entered into between any Proponent and the Town of Canmore. The Town of Canmore may also conduct periodic reviews/assessments of any selected Proponent, taking into consideration, in addition to specific work related to the project undertaken by the Proponent, ongoing Proponent staff qualifications, experience, training, and staff changes. Any evaluation/assessment will be shared with the Proponent, with the goal of immediate and permanent resolution where concerns have been raised. The Town of Canmore reserves the right to remove from the roster any selected Proponent who has been qualified by this RFP process by way of written notice if, in the sole discretion of the Town of Canmore, based on any on-going or specific evaluation or assessment of the Proponent or its performance of any work, it is deemed to be in the Town of Canmore's best interests.

2.13 LENGTH OF AGREEMENT

2.13.1 The Town reserves the right to extend this term to complete any in-progress projects.

2.13.2 Additional award periods will be based on mutual agreement between The Town and the Successful Proponent. However, The Town reserves the right to negotiate various changes to the Agreement to reflect current conditions at the time of renewal.

2.14 FORM OF CONTRACT

2.14.1 The Town of Canmore will be issuing a letter of award to the Successful Proponent to deliver the work described within this Request for Proposal.

2.15 PROFESSIONAL SERVICES TERMS AND CONDITIONS

2.15.1 Agreements consist of any number of the following documents including all amendments incorporated in the documents before their execution and subsequent amendments made pursuant to the provisions of the Agreements:

- [Master Consulting Agreement](#)
- Request for Proposal
- Addenda
- Letter to Successful Proponent
- Statement of Scope

- Technical & Fee Proposal
- Letter of Award

2.15.2 The Town of Canmore Master Consultants Agreement sets out the terms and conditions of consulting services. Firms who have not executed an MCA will be required to do so, prior to any award.

2.15.3 Any inconsistent or conflicting provisions contained within the documents forming the Agreement shall be resolved in the following order:

- Letter of Award
- Statement of Scope
- Technical & Fee Proposal
- Addenda
- Request for Proposal
- [Master Consulting Agreement](#)

2.16 STAFF CHANGES

2.16.1 Staff changes by the Successful Proponents will require written approval from The Town prior to any such change, which approval The Town may withhold in its sole discretion. The qualifications and experience of the proposed staff change must be equivalent to or better than the staff proposed in the proposal received. The Town reserves the right, in addition, and without prejudice to any other right or remedy, to immediately terminate the Agreement as a result of the failure by the Successful Proponent to provide the staff proposed.

2.17 NON-ASSIGNMENT

2.17.1 Neither the contract nor any work to be performed under the contract or any part hereof may be assigned by the Successful Proponent without the prior written consent of the Town of Canmore. Such written consent however shall not under any circumstances relieve the Successful Proponent of its liabilities and obligations under the Contract and the granting of such consent shall be within the sole and unfettered discretion of the Town of Canmore.

2.18 DEPOSITS

2.18.1 The Town of Canmore will not consider the payment of a deposit to the Successful Proponent for the scope of work in this RFP. Please include a payment schedule indicating the percentages and milestones as an attachment to the price proposal if applicable.

2.19 TERMS OF PAYMENT

2.19.1 Invoices will be paid within 30 days from the approval date of the invoice.

2.20 INSURANCE AND WORKERS' COMPENSATION BOARD REQUIREMENTS

2.20.1 Mandatory Eligibility Requirements

As a mandatory eligibility requirement for response to this RFP:

- (a) The Successful Proponent shall carry at all times during the performance of the work General Liability/ Umbrella Liability Insurance with a limit of not less than TWO MILLION DOLLARS (\$2,000,000) inclusive per occurrence for bodily injury (including death) and damage to property including loss of use thereof. Such insurance shall at a minimum include coverage of broad form property damage, contractual liability, cross liability, completed operations and product liability, and such other types of insurance as would be carried by a prudent person performing such contract work and as the Town of Canmore may from time to time require.
- (b) The Successful Proponent shall carry at all times during the performance of the work Automobile Liability Insurance for owned and non-owned automobiles with a limit of not less than TWO MILLION DOLLARS (\$2,000,000) inclusive per occurrence.
- (c) The Successful Proponent shall at all relevant times carry Workers Compensation Board coverage of either of Alberta or of another AWCBC board that will extend the required amount of coverage to cover the employee outside of their home province. Proponents shall submit their WCB number together with a letter from the appropriate department indicating there are no outstanding fees, fines, claims or debts due on the Successful Proponent's account to the Town of Canmore prior to the commencement of the work.

2.20.2 Responsibilities of Successful Proponent

- (a) The Successful Proponent shall supply insurance coverage and pay all costs and expenses, including premiums relating to the insurance coverage requirements as set out herein, and shall supply the Town of Canmore with a certificate of insurance for all policies on an annual basis. Such policies will include a statement that the coverage shall not be terminated without a prior 30-day written notice to the Town of Canmore.
- (b) The Successful Proponent or their insurer will notify the Town of Canmore at least thirty (30) days prior to any change in insurer, any cancellation of the insurance policy, or any substantial change in the policy or coverage that would materially alter the coverage provided by the Successful Proponent to the Town of Canmore.
- (c) The Successful Proponent shall provide a certificate of such insurance to the Town of Canmore within five (5) days of notification of award or prior to commencing the work, whichever is sooner.

2.21 INDEMNIFICATION

2.21.1 The Successful Proponent agrees to indemnify and save harmless the Town of Canmore, its councillors, officers, agents, representatives, and employees, against all suits or claims, requests, legal action and liability regardless of the nature and expenses sustained from injuries or death or any damages or loss to property as a result of the usage of premises or in the execution of the Successful Proponent functions arising from this contract except to the extent of the Town of Canmore's gross negligence.

2.21.2 At no time will the Town of Canmore be responsible for any injury sustained by the Successful Proponent, their employees or any person on the Town of Canmore's premises, nor will the Town of Canmore be responsible for any loss, including loss of profits or damage caused to the goods of the Successful Proponent, their employees or any other person, including damage to vehicles and their contents, while these goods are on the Town of Canmore's premises or site.

2.21.3 The Town of Canmore shall not be liable for any incidental, indirect, special or consequential damages or any loss of use, revenue or profit of the Successful Proponent arising out of or in any way related to this RFP or subsequent contract.

2.22 DEBRIEFING

2.22.1 The Town of Canmore will offer a debrief to unsuccessful Proponents on request.

END OF SECTION 2.0

3.0 PROJECT OVERVIEW AND SCOPE

3.1 RFP DEFINITIONS

Owner	the Town of Canmore
Project	Tourism Consulting and Stakeholder Engagement Services
Proponent	a firm, individual or company who or which intends to submit or submits a Proposal pursuant to this RFP.
Proposal	a submission to the Town of Canmore in response to this RFP.
Successful Proponent	a firm, individual or company with whom the Town of Canmore may decide to initially discuss contract arrangements based upon acceptance of the Proponent's Proposal.
Consultant	the Successful Proponent to whom the Town of Canmore issues a letter of award for Tourism Consulting and Stakeholder Engagement Services

3.2 PROJECT DESCRIPTION/DESCRIPTION OF NEED

- 3.2.1** The Town of Canmore is a unique mountain community nestled in the Bow Valley with a permanent resident population of roughly 15,000. Approximately one third of Canmore's housing stock is owned by non-permanent residents and is used as vacation properties or seasonal residences, making Canmore's effective population closer to 20,000.

Once primarily a mining-based economy, Canmore is now a vibrant community with a thriving tourism-based economy. Its natural beauty, boundless recreational opportunities, and rich and diverse creative offerings attract visitors on weekends and during expanding peak seasons. While tourism is clearly the town's primary economic driver, the way it has developed is not universally supported by the resident community and there are growing calls to establish a more mutually beneficial relationship between the tourism industry and the community, where the community and industry have shared values and goals and the community provides the industry with the social license to operate.

Tourism Canmore Kananaskis (TCK), the local Destination Management Organization (DMO) developed a new [strategic plan](#) in 2019 that challenged the status quo model for tourism and described a compelling reason for change in this way:

"In order to retain its authenticity and maintain its attractiveness to visitors and residents, Canmore must act now to shape the future. There needs to be a purposeful and deliberate effort on the part of the community and businesses to find common ground and work toward a shared vision for tourism. Failure to take action and work collaboratively could result in over tourism and degradation of the core value proposition of the community. The impacts of this could include decreased quality of life for residents, negative environmental impacts and reduced viability for tourism businesses. If the region chooses to act proactively, it has an immense opportunity to become an iconic, internationally known destination and a leader in sustainable tourism development."

Canmore Town Council struck a [Tourism Task Force](#) in September 2020 to take on this

call to action and lead the “*purposeful and deliberate effort on the part of the community and businesses to find common ground and work toward a shared vision for tourism*”.

The Task Force has been meeting bi-weekly since October 1, 2020 and has established a [Terms of Reference](#) to guide their work. The Town is seeking the expertise of a tourism and engagement specialist to advise and support the Task Force in this work.

3.3 SCOPE OVERVIEW/SCOPE OF SERVICES

3.3.1 GENERAL SCOPE OF WORK

The Consultant will provide the expertise and guidance needed to work with the Tourism Task Force to lead a robust community and industry stakeholder engagement process that generates broad based and meaningful conversations regarding tourism and its role in and impacts on the Town of Canmore and its residents. This process will lead to a shared understanding and will define a comprehensive and balanced triple bottom line framework for tourism and the tourism industry in a way that:

- Preserves the social fabric of the community,
- Maintains and where possible enhances ecological integrity,
- Continues to ensure Canmore’s long-term economic health, and
- Provides stakeholders with the opportunity to contribute to the tourism framework.

3.3.2 DUTIES, RESPONSIBILITIES AND DELIVERABLES OF CONSULTANT

The Consultant will assign equal priority to each of the following duties, responsibilities and deliverables:

EDUCATION

1. Provide education opportunities for Task Force members, the community and the tourism industry to ensure a shared purpose, understanding, and vocabulary for the work, including by learning from the experiences of tourism communities around the world regarding over tourism, sustainable and regenerative tourism, best practices, and challenges.
2. Create shared learning and dialogue opportunities that allow for the community and the tourism industry to build trust and develop understanding of mutual interests.

PUBLIC PARTICIPATION

3. Develop a public participation and communications plan that lays a foundation for meaningful community and stakeholder engagement by developing shared terms, conditions of success, and frameworks for decision-making and seeks to define guiding principles for tourism through a community-wide process that addresses and is reflective of:
 - a. The qualities that make Canmore unique and special for residents, and which therefore must be preserved and protected while embracing the tourism opportunities that allow Canmore to thrive.
 - b. How to harmonize community needs and desires as well as the needs and desires of the visitors and tourism industry.
 - c. How to ensure that tourism in Canmore contributes to the triple bottom-line of people, planet and profit.

4. Ensure key community, business and tourism industry leaders are included in the process.
5. Implement public participation activities.

DELIVERABLES

6. The guiding principles document that illustrates the well-defined guiding principles as a framework for a vision of tourism in Canmore that is supported by both community and industry stakeholders.
7. The consultant’s report that documents and outlines the process with critical findings and suggestions for implementation.
8. A PDF of all the information and data that was gathered as the process unfolds.
9. A presentation of the draft and final project findings to the Task Force and Council.

3.3.3 PROJECT OBJECTIVES AND SUCCESS METRICS

Project Objectives	Success Metrics
1 Well-managed project	Written and oral updates provided to Project Lead and the Tourism Task Force regularly throughout the project Meets cost and schedule constraints outlined herein
2 Clear role and involvement for Tourism Task Force Members	Member input is sought throughout the project Members are actively involved in education and engagement sessions Members are aligned in support of project findings
3 Supports the vision of the Town of Canmore and provides alignment with guiding documents	Strategically supports the vision and priorities of the Town of Canmore 2019-2022 Strategic Plan. Aligns with the objectives of the following guiding documents: <ul style="list-style-type: none"> • 2019-2029 Tourism Strategic Plan • 2020 Economic Development Strategy • 2020 Cultural Master Plan • 2017 Tools for the Future – Guide to Connect People and Community • 2017 Commitments to Truth and Reconciliation Calls to Action
4 Clear and well managed stakeholder engagement and communication	Public engagement aligns with the Town’s <u>Public Participation Policy</u> and brand guidelines. A public participation plan is submitted with the RFP and finalized in conjunction with the Task Force and Town of Canmore communications department. Project utilizes multiple communication channels in collaboration with the Town of Canmore’s communications team to inform and engage the public, including residents, individuals and groups from the environmental community and social services sector as well as tourism industry leaders and businesses, and maximizes existing Town of Canmore channels.

Project Objectives	Success Metrics
	<p>Communication plan is developed to keep the community informed about the project from the planning stages through to completion.</p> <p>Public engagement is inclusive and people feel heard and understand how their input will (or will not) be used in the process.</p> <p>Accurately and objectively recorded and assessed public input.</p>

3.4 PROJECT BUDGET

In the interest of achieving the best project outcome and value for money, the Town of Canmore has identified the project budget for Consultant fees (including all team members and sub-consultants) to be a maximum of \$70,000, inclusive of anticipated disbursement costs but exclusive of GST.

The Town of Canmore wishes to hire the best team to complete as much of the scope of work as possible and will evaluate Proponent's Proposals based on the best value provided for or within the available budget. In preparing the proposal, each Proponent must consider the requirements outlined in this RFP. Should a Proponent feel the budget allocation is insufficient to carry out the requirements of this RFP, or disagrees with particular deliverables required of the Successful Proponent, the Proponent must clearly list all exceptions in their proposal.

Proposals submitted in response to this RFP that exceed the budget described above will not be considered.

3.5 ANTICIPATED PROJECT SCHEDULE

Project Milestone	Anticipated Date
Award to Successful Proponent	Wednesday, February 24, 2021
Project initiation meeting with Town admin	Thursday, February 25, 2021
Project Kick-off Meeting with Task Force	Thursday March 4, 2021
Guiding Principle Development Complete	Thursday, April 8, 2021
Public Participation Plan Finalized	Mid-April 2021
Project Update to Task Force	Thursday, April 22, 2021
Stakeholder shared learning and engagement	May-July 2021
Stakeholder data analysis/refinement	August-September 2021
Presentation of Findings to Task Force	Thursday September 23, 2021
Council Presentation/Project Completion	Tuesday, October 5, 2021

END OF SECTION 3.0

4.0 RESPONSE REQUIREMENTS AND EVALUATION CRITERIA

4.1 FORMAT AND OUTLINE OF RESPONSES

Electronic RFP responses are to be on 8.5” x 11” size pages in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission.

Responses to each section shall be marked with the corresponding letter and number (e.g. A1, A2, etc.).

4.2 PROPOSAL SUBMISSION REQUIREMENTS

Proponents are requested to submit a proposal containing the following:

A. Mandatory Requirements

Requirements	
A1	Signed signature and waiver sheet
A2	Signed addendum (addenda) if applicable
A3	Insurance Requirements: Provide evidence from your insurance company confirming your ability to secure insurance as described in Section 2.19
A4	Proposed fixed fee proposal is within the approved project budget

B. Project Understanding and Approach

Requirements		Page Limit
B1	Describe your understanding of the project and unique challenges associated with delivering similar tourism consulting and community engagement services.	One (1) page
B2	Based on your understanding of the Tourism Strategic Plan, the Tourism Task Force Terms of Reference and other guiding documents for the Town of Canmore, provide details of your recommended approach to achieve the project deliverables and meet the project objectives.	Four (4) pages
B3	Provide a project schedule showing the key tasks and deliverables. Include any review periods required by The Town.	Not Applicable

C. Team and Relevant Experience

Requirements		Page Limit
C1	Provide a brief description of your firm (including subconsultants), your relevant experience, and describe why you want to work with the Town of Canmore.	One (1) page
C2	Provide an introduction to your team, including subconsultants, and explain why they are well suited for the role. Include an organization chart.	Two (2) pages
C3	Provide resumes for each staff proposed on the project.	Two (2) pages per person

Requirements		Page Limit
C4	<p>Provide a summary of three to five relevant projects that your firm has completed, or are currently involved in. For each project, please provide:</p> <ul style="list-style-type: none"> • A description of work completed by your team; • List of the team members proposed on this RFP who worked on the project • A description of what made the project successful; • A description of the relevance to this RFP; • Project Budget; • Web link to any reference documents; and • Client reference and contact information. 	Two (2) pages per project

D. Public Participation Plan

Requirements		Page Limit
D1	Provide a draft public participation plan that outlines the approach for creating meaningful community engagement and development of guiding principles for tourism in the community.	Four (4) pages
D2	Public participation plan aligns with the Town’s <u>Public Participation Policy</u> and brand guidelines.	Not Applicable

E. Price Proposal

Requirements	
E1	Completion of Fixed Price Form in Appendix A
E2	Completion of Hourly Rate Form in Appendix B

4.3 EVALUATION PROCESS

4.3.1 Selection of the Successful Proponent pursuant to this RFP will be made on the basis of the Proponent’s written response and other factors germane to the Town of Canmore. The responses shall be evaluated based on the matrix shown below.

Evaluation Criteria	Evaluation
A. Mandatory Requirements	Pass / Fail
B. Project Understanding and Approach	25%
C. Project Team and Relevant Experience	30%
D. Public Participation Plan	35%
E. Price Proposal	10%

4.3.2 A submission will first be reviewed for compliance with the mandatory requirements of this RFP as listed above. A submission not complying with the criteria may be considered non-compliant and not receive further consideration.

4.4 PROPONENT SHORTLIST

- 4.4.1 It is expected that up to three (3) Proponents may be shortlisted based on the evaluation of submissions for the criteria outlined in section 4.3 above. Shortlisted Proponents may be required to undergo an interview prior to final selection of the Successful Proponent.
- 4.4.2 Proponents are not guaranteed any paid assignment as a result of being shortlisted via this RFP.

4.5 CONFIDENTIALITY OF EVALUATION

- 4.5.1 Evaluation scores and rankings are confidential, and apart from identifying the top-ranked Proponent, no details of the submission, score or ranking of any Proponent will be released to any Proponent.
- 4.5.2 If required by the Canadian Free Trade Agreement, the name of the Successful Proponent and the value of the award will be posted on the Alberta Purchasing Connection.

4.6 RFP SCHEDULE

The following schedule has been established for this RFP:

Project Stage	Anticipated Date
RFP Issue Date	Friday, January 15, 2021
RFP Close Date	Friday, February 5, 2021
RFP Review and Evaluation Complete	Friday, February 12, 2021
Interview Process Complete	Friday, February 19, 2021
Award to Successful Proponent	Wednesday, February 24, 2021
Project Completion/Presentation to Council	Tuesday, October 5, 2021

END OF SECTION 4.0

5.0 SIGNATURE AND WAIVER SHEET

1. The Proponent hereby acknowledges that prior to submitting a Proposal for this project, the Proponent has obtained from The Town and thoroughly reviewed in order to be familiar with and certain as to all of the terms and conditions set out in the Request for Proposal documents and all amendments thereto which are incorporated by reference into the above-cited Proposal as follows:
 - a) Town of Canmore Master Consulting Agreement;
 - b) Affidavit Verifying Corporate Signing Authority (if a corporation); and
 - c) Affidavit of Execution Individual or Sole Proprietorship (if not a corporation).

The referenced documents may be viewed at The Town's website (<https://canmore.ca/business/find-a-form>).

- a) The Proponent acknowledges the documents incorporated by reference as indicated in paragraph 1 above.
 - b) The Proponent further acknowledges that unless otherwise agreed by both parties and confirmed in writing it is subject to and bound by each provision included in each document incorporated by reference to the same extent that it would be if each such provision were set out and included with the hard copy of the Contract Documents.
 - c) The Proponent further acknowledges and confirms that either:
 - i. It has read and understood each provision included in each document incorporated by reference; or
 - ii. By signing this Signature and Waiver Sheet it waives any and all rights to claim or argue that it was not aware of any provision of any document incorporated by reference.
2. The terms of this document are severable from one another, and the invalidity of any one or more paragraphs in this document, will not affect the validity of the other paragraphs.
 3. The Proponent hereby acknowledges it has thoroughly reviewed and understood all the terms and conditions of the Request for Proposal ("RFP") which include those contained in the Instructions for Responding to this Request for Proposals, General Conditions of Response, all documents included by reference as set out in Paragraph 1, all drawings and specifications as may be listed in the Table of Contents and included in the Appendices (together the "Terms and Conditions").
 4. By signing this sheet, I confirm I have the full authority to represent the Proponent in all matters relating to the Proposal, and I confirm that the Proponent agrees to be bound by all the Terms and Conditions.

**Request for Proposal – Tourism Consulting and Stakeholder
Engagement Services**

Reference Number: 7165



Name of Business Entity	
Complete Address:	
Phone	Mobile Phone
Fax	Email
Website	
Proponent Signature	Affix Corporate Seal:
Title	
Printed Name	
Date	

Note: A seal is a preferred element of the signing of a submission. However, if the corporation or other legal entity making the submission does not have a seal or if it is not available, the corporation or entity should provide reasonable documentation to confirm the printed name and position of the person or persons signing, as well as to confirm that such person or persons signing on behalf of the entity has or have authority to bind the entity. Affidavits of authority and execution will normally constitute reasonable confirming documentation. Forms for each of these affidavits can be found at (<http://canmore.ca/business/find-a-form>). Without limiting the preceding paragraph but for further clarity, if the corporation or other legal entity does not have a seal or if it is not available:

- For a corporation or other business association, the printed name and position of the person or persons signing together with an affidavit of execution and an affidavit of authority should be completed and submitted,
- For an individual or sole proprietorship, the printed name and position of the person signing together with an affidavit of execution should be completed and submitted.

6.0 APPENDIX A – PROPOSED FIXED PRICE FORM

Date: _____

I/we, _____

(Company Name)

of _____

(Business Address)

I/we have carefully examined all documents prepared for this contract; and hereby offer to furnish all labour, materials, and services for the proper execution and completion of the entire scope of work for the **Tourism Consulting and Stakeholder Engagement** project including all addenda thereto which are acknowledged hereinafter for the above project for the fixed price indicated as follows:

Total proposed fixed price **excluding GST**:

_____ CAD Dollars (\$_____)

I/we acknowledge receipt of the following Addenda and have included for the requirements thereof in my/our RFP response: Addendum # _____ to _____.

(Signature)

7.0 APPENDIX B – HOURLY RATES

Date: _____

I/we, _____

(Company Name)

of _____

(Business Address)

Provide proposed hourly rates **excluding GST**:

Position Title	Rate Per Hour (in CAD \$)

I/we acknowledge receipt of the following Addenda and have included for the requirements thereof in my/our RFP response: Addendum # _____ to _____.

(Signature)

8.0 APPENDIX C – REFERENCE DOCUMENTS

Guiding documents for the Town of Canmore can be found [here](#). Those most relevant to this RFP are:

[Tourism Task Force Terms of Reference](#)

[Town of Canmore 2019-2022 Strategic Plan](#)

[Town of Canmore Public Participation Policy](#)

[2019-2029 Tourism Strategic Plan](#)

[2020 Economic Development Strategy](#)

[2020 Cultural Master Plan](#)

[2017 Tools for the Future – Guide to Connect People and Community](#)

[2017 Commitments to Truth and Reconciliation Calls to Action](#)