



**REQUEST FOR PROPOSALS
RFP # 2021-EDO-01**

**Consulting Services for
Comprehensive Branding Strategy**

POSTING DATE: **August 24, 2021**
SUBMISSION DUE DATE: **September 13, 2021**
TIME: **4:00 P.M. E.S.T.**
LOCATION: **The Corporation of the Town of Wasaga Beach
Town Hall
30 Lewis Street
Wasaga Beach, Ontario
L9Z 1A1
edo2@wasagabeach.com**

LATE SUBMISSIONS WILL NOT BE ACCEPTED.

DEADLINE FOR QUESTIONS (must be in writing): **September 6, 2021
4:00 P.M. E.S.T.**

PROCUREMENT CONTACT: **Kaitlyn Monsma
Economic Development Officer
E-mail – edo2@wasagabeach.com
Phone – 705-429-3844 x 2284**

PROPOSAL SUBMISSION LABEL

PROJECT NO: 2021-EDO-01

PROJECT DESCRIPTION: Town of Wasaga Beach
Comprehensive Branding
Strategy

FROM: _____

TO: Kaitlyn Monsma
Economic Development Officer

COMPANY NAME: Town of Wasaga Beach

ADDRESS: 30 Lewis Street
Wasaga Beach, Ontario
L9Z 1A1

CONTACT NAME: _____

PHONE NO: _____

CLOSING DATE: _____

DATE/TIME RECEIVED: _____

CLOSING TIME: _____

RECEIVED BY: _____

PREVIEW
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1.0 Introduction

The Town of Wasaga Beach will conduct a branding exercise during the fall/winter of 2021 in order to create a Comprehensive Branding Strategy and related materials to support its delivery. This exercise is being managed by the Town’s Economic Development Department and the branding committee. The Town is seeking proposals from qualified consultants to create a new brand for the Town of Wasaga Beach. This project will require a consultant skilled in group facilitation, collaboration, analysis of opportunities, graphic design, marketing and strategy formulation.

A successful branding strategy will redefine the Town’s image and showcase the Town’s unique identity, which separates it from other municipalities. This will result in economic sustainability through community unity, citizen pride and increased potential to attract residents, visitors, businesses and investment. A strong, consistent and persuasive brand is essential for the Town of Wasaga Beach to seize these opportunities.

2.0 Definitions

The following definitions apply to the interpretation of the RFP.

“**RFP**” means Request for Proposals.

“**Proposal**” means all the documentation submitted by the Proponent in response to this RFP, which has been accepted by the Town, in whole or in part.

“**The Town**” means the Town of Wasaga Beach.

“**Proponent**” means the legal entity submitting a response to the Request for Proposals.

“**Services**” means the goods and/or services to be provided by the Consultant to the Town.

“**Consultant**” means the successful Proponent that has signed the Agreement.

“**Addenda**” or “**Addendum**” means such further additions, deletions, modifications or other changes to any Proposal Document.

“**Council**” means the elected Council for the Town of Wasaga Beach.

“**Contract**” means the agreement in writing, governing the performance of the Work, which has been executed by the Town and selected Consultant following acceptance by the Town for the selected Proponent’s submission.



“**Work**” means the Work to be undertaken by the Consultant pursuant to the provisions of the Contract.

“**Working Day**” means Monday through Friday inclusive by excluding Saturday and Sunday and any recognized statutory holiday.

3.0 Background

The Town of Wasaga Beach will conduct a branding exercise in the fall/winter of 2021 in order to create a Comprehensive Branding Strategy and related materials to support its delivery. This exercise is being led by the Town’s Economic Development Department with support from the Branding Committee. The Town is seeking proposals from qualified consultants to create a new brand for the Town of Wasaga Beach.

Presently, the Town’s branding efforts consist of a corporate logo from 1975, multiple department logos and the addition of new tourism ‘Sparkle’ brand and wayfinding system. Moving forward, the Town would like to use branding to communicate solidarity and a clear unified vision for the future in an effort to build citizen pride, investment attraction and business expansion and retention. By solidifying a common vision, identity, and image, the Town of Wasaga Beach can better communicate and market its community.

Creating a compelling brand for Wasaga Beach will include a number of unique challenges. The Town is geographically long, with a mix of natural and unnatural elements. The population is a mix of multi-generational residents, newcomers, part-time residents and retirees, with great socio-economic diversity amongst these groups. There are also a number of different audiences that a new brand must appeal to: new and existing businesses, permanent and part-time residents, tourists and visitors. The Town of Wasaga Beach also has many departments with varying brands and this strategy must pull each one together into one consistent brand. In addition, the Town recently developed the Tourism Sparkle brand and the strategy must align with it. The Town recently adopted a wayfinding strategy which established signage design and graphics which must also be aligned into the unified branding strategy. Developing Wasaga Beach’s new brand will require a thorough understanding of our organization, community, landscapes, challenges and what brings us all together.

A successful branding strategy will redefine the Town’s image and showcase the Town’s unique identity, which separates it from other municipalities. This will result in economic sustainability through community unity, citizen pride and increased potential to attract residents, visitors, businesses and investment. A strong, consistent and persuasive brand is essential for the Town of Wasaga Beach to seize these opportunities.



4.0 Scope of Work

The successful Proponent will develop a comprehensive Branding Strategy for the Town of Wasaga Beach. Proposals should, at a minimum, address the following:

Research and Analysis

- Stakeholder consultations to gain input, buy-in and validation of the brand strategy;
- Review public consultation data and research completed by the Town through the Tourism Brand and Wayfinding Strategy to determine what can be carried over into this project and what is necessary to be taken on by the project consultants;
- Establish and implement a public consultation process to identify the town's distinctive characteristics and attributes;
- Conduct a SWOT analysis and leverage information gained in the development of the new brand and its subsequent promotion;
- Review the multiple brands currently used by various town departments and identify synergies for incorporation into the new brand;
- Define target audience – devise an effective strategy to address their needs; and
- Establish realistic benchmarks and reasonable timeframe for completion.

Brand Platform

- Build a brand platform that supports what the town represents and differentiates it from other areas;
- Designing the new Wasaga Beach logo to establish brand identification;
- Developing a new tagline that highlights the brand's mission, purpose, town culture and creates a connection with target audiences;
- Creating a manifesto in narrative form to convey what makes the town unique and encourages people to envision living, working and playing in Wasaga Beach;
- Create a message map that converts the manifesto into a graphic that conveys both the central message as well the secondary messages that support it;
- Developing a Style Guide to protect the uniformity of the brand by providing specific guidelines regarding its use;
- Incorporating the new tourism Sparkle brand and Wayfinding Strategy into the branding strategy;
- Creating draft design concepts inclusive of colours, fonts, language, and imagery;
- Developing concepts for stationary, business cards, and marketing campaigns; and



- Providing digital artwork for the Town to use for a variety of mediums such as flags, shirts, vehicles, website, and social media outlets.

Implementation Plan

- Create a realistic implementation plan that includes direction with respect to promotion and execution of the new brand, phasing and costing.

5.0 Deliverables

The successful proponent will provide to the Town the following deliverables including but not limited to:

- Brand identity creative (including logo and tagline for multiple uses now and into the future) and concepts for advertising, website, marketing, etc.;
 - Creative to include fonts, design styles, photo styles, colour palette, etc.
 - Creative suitable/adaptable to print and online advertising, websites/social media, letterhead, vehicles, flags, brochures, signage, etc.
- Brand guidelines/Style Guide (to ensure consistency across all communication channels);
 - Guidelines to include acceptable and unacceptable uses of the brand, permission guidelines for logo use and samples of how the brand could be applied to various collateral such as social media, websites, posters, print collateral, official documents, etc.
- Incorporation of the existing tourism branding and the wayfinding signage design and graphics;
- An implementation plan that includes direction with respect to promotion and execution of the new brand, phasing and costing;
- Provide advice and guidance to staff on copyright, patent and trademark for the brand;
- A Comprehensive Branding Strategy that incorporates all recommendations, branding identity creative, brand guidelines and implementation plan.
- Four (4) hard copies and one electronic .pdf version of all final documents.
- Digital files of all brand identity creative.
- A final Power Point presentation summarizing the project and key findings; and
- The Proponent will make one final in person presentation to Council outlining the project and key findings.

6.0 Information to Proponents

6.1 Background Information



The successful proponent is to consider and incorporate as appropriate the following reference materials including but not limited to:

- [The Town of Wasaga Beach Sparkle Brand Manual](#)
- [The Town of Wasaga Beach Comprehensive Wayfinding Strategy](#)
- [The Town of Wasaga Beach Website](#)
- [The Town of Wasaga Beach Tourism Website](#)
- All logos and brands in use by the various Town Departments.

6.2 Bidding System Registration

All Proponents must have a vendor account with the Town's electronic Bidding System at: <https://wasagabeach.bidsandtenders.ca> and must be registered as a plan taker for this opportunity. This will enable the Proponent to download the solicitation document, to ask questions, to receive Addenda email notifications and download posted Addenda's.

6.3 Proposal Submission

6.3.1 Proposal Content

The Consultant shall confirm a clear understanding of the work to be undertaken as described in the scope of work. The proposal must demonstrate that the Consultant and its team have recent and significant experience with this type of work. When noting examples of experience gained on similar projects, the proposal must also note which current staff members worked on that project and what their role was.

The proposal must indicate what role each of the Consultant's team will be carrying out for the project. The Consultant may not substitute the project team members noted in the proposal without permission of the Town.

When proposing a schedule, the Consultant must also indicate that their workload is such that they will have time to complete the project as promised. If the Consultant is very busy and cannot perform and/or deliver the project as requested, then they should either decline the work or propose a longer schedule at the time of the RFP submission.

The proposal must specifically address all requirements of the work and any matters related to its successful implementation.

Proposal content shall include the following minimum information:

- Corporate name and overview of company;
- List of sub-consultants to be engaged for the project;
- List of personnel to be assigned to the project with their related qualifications;
- Description of understanding of Town of Wasaga Beach project requirements;
- Work program:



- General approach, project objectives and issues;
 - Detailed work program; and
 - Deliverables.
- Schedule of project tasks and total duration in GANTT chart format identifying critical path items; and
 - A listing of at least three references where similar or related works has been completed, along with descriptions of the project and the names of the contact persons. Municipal clients would be preferred, but not mandatory.

The technical part of the proposal shall include the following sections:

- Table of Contents
- Work Plan and Schedule
- Project Team
- Experience with Similar Projects

6.3.2 Pricing Information

Submit the following in an appendix to the proposal labelled “Pricing Information”:

- Hourly billing rates for each person to be assigned to the project and breakdown times estimates for each;
- Estimate of billable expenses;
- Maximum or Upset Fee(s) for each task;
- Indicate time and costs for any proposed sub-consultants. The lump sum or unit price quoted for each Deliverable and Service will form the basis of payment. The summation of prices quoted for all Deliverables and Services will constitute the "Maximum Ceiling Price". The Totals should not include HST.

Proponents are advised that the Town’s budgeted amount for this assignment is \$64,000 exclusive of HST. The project is dependent on the County of Simcoe 2021 Economic Development Funding program approval. Should the Town be declined the funding, the project will not proceed.

6.3.3 Alternative Proposal

The Proponent may submit one or more Proposals as a solution with the Town’s requirements. However, each alternate Proposal shall be submitted on the formal proposal document and in a separate envelope supplied for this purpose and the words “Alternative Proposal” shall appear on the envelope

6.3.4 Address for Submission and Proposal Submission Deadline

Four (4) hard copies of the proposals shall be delivered in a sealed envelope marked “Town of Wasaga Beach – Comprehensive Branding Strategy” as well as an electronic .pdf copy sent to



clerk@wasagabeach.com not later than the Proposal Submission Deadline of:

4:00 pm, September 13, 2021 to:

Dina Lundy
Town of Wasaga Beach
30 Lewis Street
Wasaga Beach, Ontario L9Z 1A1
Phone: (705) 429-3844 x2223
Email: clerk@wasagabeach.com

6.3.5 Hard Copies

Four (4) hard copies of the proposals shall be submitted in addition to one electronic .pdf version. No facsimile transmissions will be accepted. Originals must be forwarded to the above address so that they may be attached to the original hard copy for validity.

6.3.6 Late Submissions

The date and time of receipt of a Proposal shall be the date and time indicated by the Town's date and time stamped on the Proposal. Under no circumstance will proposals received after the Proposal Submission Deadline be accepted.

6.3.7 Proposal Revision

Any changes or revisions to this RFP will be issued to all proponents in writing as a formal addendum to this RFP. Prior to the Proposal Submission Deadline, the Town may modify any provision or part of the RFP at any time upon notice in writing to the proponents, if a reasonable time is allowed by the Town for the proponents to respond to such modifications including, without limitation, the opportunity to make any necessary revisions to their respective proposals.

6.3.8 Proponent Contact

Each Proponent shall designate in their Proposal the name of the Contact to whom any additional information deemed relevant to the assignment may be communicated.

6.3.9 Request for Clarification

To contact the Town or ask questions in relation to this RFP, respondents must initiate the communication electronically through the Bidding System using the Question and Answer function. The Town will not accept any Proponent's communications by any other means.

All requests for clarification or inquiries concerning this RFP shall be submitted no later than **September 6, 2021 at 4:00pm.**

For the purposes of this RFP the RFP Contact is:

Name: Kaitlyn Monsma



Title: Economic Development Officer

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials, or other representatives of the Town, other than the RFP Contact through the Town’s Bidding System, concerning matters regarding this RFP. Failure to adhere to this rule may result in the disqualification of the Proponent and the rejection of the Proponent’s Proposal.

It is the Proponent’s responsibility to avail itself of all the necessary information to prepare a Proposal in response to this RFP.

6.3.10 Review and Evaluation Criteria

The details of each proposal will be kept confidential by the Town. The recommendation to Council of the Town will be based on the following criteria and evaluated utilizing a standard weighed score evaluation form:

Criteria	Maximum Points
Quality and Completeness of Proposal	15%
Experience with Similar Projects	20%
Value Added Service	10%
Project Understanding/Methodology	25%
Project timing and schedule	15%
TOTAL TECHNICAL COMPONENT	85%
COST / FINANCIAL COMPONENT	15%

Proponents are advised that proposals will be evaluated solely on the basis of information submitted in accordance with the request for proposals. The Town reserves the right, if deemed necessary, to short-list the proposals and to request an additional verbal presentation from each short-listed proponent. The Consultant may supplement their presentation with a summary in written format to clarify points raised during the process.

The Town reserves the right to reject any or all proposals and not necessarily to accept the lowest priced proposal. The Town also reserves the right to waive formality or technicality in any proposal. The Town also reserves the right to not proceed with the project if the Town is declined project funding from the County of Simcoe 2021 Economic Development Funding program.

An award recommendation will be based on merit, relying on the information in the proposal and presented to Council of the Town for approval.

6.3.11 Time Table



The following dates are tentative and are subject to change without penalty to the Town provided that all Proponents are notice of the change on www.bidsandtenders.com.

Activity	Date/Deadline
RFP Posting Date	August 24, 2021
Clarification Submission Deadline	September 6, 2021
Deadline for Issuing Addenda	September 8, 2021
Proposal Submission Deadline	September 13, 2021
Anticipated Award Date following Council Resolution	September 28, 2021
Anticipated Project Start Date	September 30, 2021
Anticipated Project Completion Date	January 28, 2021 (or as proposed)

6.4 Execution of Contract

6.4.1 Selection of Proponent

The Town anticipates that a Proponent will be selected by the Town within thirty (30) Calendar Days of the Proposal Submission Deadline. Notice of selection by the Town to the selected Proponent will be in writing. The selected Proponent shall execute the Agreement presented to the successful Proponent and satisfy any other applicable condition of this RFP within seven (7) Calendar Days of notice of selection.

It should be noted that the award of the contract is subject to:

1. Council Approval

6.4.2 Failure to Execute Agreement

In the event that a selected Proponent fails or refuses to commence the Agreement or satisfy any other applicable condition within seven (7) Calendar Days of notice of selection, the Town reserves the right, in its sole discretion, to cancel the award and award the contract to another Proponent, or not to accept any Proposal, or to issue a new RFP, and the defaulting Proponent shall be liable for all losses, damage, costs and expenses (including consequential losses and damage, and legal fees) suffered or incurred by the Town as a direct or indirect result thereof, including but not limited to any increase in the price of performance over the price submitted by the defaulting Proponent in its Proposal.

6.5 General Information

6.5.1 Right to Accept or Reject

The Town reserves the right to reject any and all Proposals, whether or not completed properly and whether or not they contain all required information. Please note that in order to proceed with this project, confirmation of approval from the County of Simcoe 2021 Economic Development Funding program is required. The Town also reserves the right to



not proceed with the project if the Town is declined project funding from the County of Simcoe 2021 Economic Development Funding program.

The Town may request clarification where any Proponent's intent is unclear and may waive or request amendment where, in the opinion of the Town, there is a minor irregularity or omission in the information that has been submitted in a required document.

The Proponent understands and agrees that the Town may, if deemed necessary, verify any information provided in any Proposal. If there is any evidence of misleading or false information having been submitted, the Town may, in its sole discretion, reject the Proposal.

6.5.2 Ownership and Copyright

All materials and information prepared, conceived or produced and delivered to the Town in the preparation of the Proposal and the negotiation and performance of any Agreement by the Proponents shall be the sole property of the Town.

6.5.3 Irrevocable Response

The Proposal submitted is irrevocable by the Proponent following the Proposal Submission Deadline and will remain in effect and open for acceptance by the Town for a period of ninety (90) Calendar Days only, unless all Proponents explicitly agree to extend their financial proposal(s) for a longer period. Otherwise all Proponents may be requested to resubmit Financial Proposal.

6.5.4 No Liability for Expenses or Damages

The Town will not be liable for any loss or damage suffered by any Proponent including, without limitation, any expenses incurred in the preparation and submission of the Proposal.

6.5.5 Confidential Responses

The Town will consider all Proposals as confidential, subject to the provisions and disclosure requirements of the Freedom of Information and Protection of Privacy Act R.S.O., 1990, c.F.31, as amended. The Town will, however, have the right to make copies of all proposals received for its internal review process.

6.5.6 Bribery/Fraud

Should any prospective Proponent or any of their agents give or offer any gratuity or attempt to bribe any employee of the Town or attempt to commit fraud, the Town shall be at liberty to cancel the prospective Consultant's submission or contract.

6.5.7 Conflict of Interest

Each Proponent shall declare in their Proposal, any situation which may be a conflict of interest or that may appear as a potential conflict of interest in submitting a Proposal.

6.5.8 Compliance with AODA Accessibility Standards



The Proponent shall comply with applicable Regulations of the Accessibility for Ontarians with Disabilities Act, 2005 (the AODA), with regard to the provision of its goods or services contemplated herein.

The Proponent shall ensure that any employees, agents, volunteer or others for whom it is at law responsible and who are involved in providing goods and services to the Town of Wasaga Beach receives training as required by these regulations.

The Proponent acknowledges that pursuant to the AODA, the Town must, in deciding to purchase goods or services through its procurement process, consider the accessibility for persons with disabilities to such goods or services.

The Proponent further acknowledges that any documents it produces for the Town of Wasaga Beach which may be posted to the Tow's website or otherwise be published shall be prepared in accordance with AODA requirements.

6.5.9 Municipal Freedom of Information and Protection of Privacy Act

The proponent is advised that the Town is governed by Ontario's Municipal Freedom of Information and Protection of Privacy Act ("MFIPPA") and information submitted to the Town in response to this RFP may be subject to disclosure under MFIPPA. The proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Town and is advised to consult with their own legal advisors regarding the appropriate way to identify such information. The Town will make reasonable efforts to safeguard confidential information, subject to its disclosure requirements under MFIPPA or any disclosure requirements imposed by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis to the Town's advisers retained to advise or assist with this RFP, including with respect to evaluation.

6.5.10 Insurance

The Consultant shall, at their own expense, obtain and maintain until the termination of the contract, with insurers acceptable to the Town, the following insurance, and provide evidence thereof:

- a. Comprehensive general liability insurance on an occurrence basis for an amount of not less than Two Million Dollars (\$2,000,000) and shall include the Town of Wasaga Beach as an Additional Insured with respect to the Consultant's operations, acts and omissions relating to his obligations under this Agreement, such policy to include, but not be limited to, non-owned automobile liability; personal injury; broad form property damage; blanket contractual liability; contingent employers' liability; and, cross liability and severability of interest clauses.
- b. Automobile liability insurance for an amount not less than Two Million Dollars (\$2,000,000) on forms meeting statutory requirements covering all licensed vehicles used in any manner in connection with the performance of the terms of this Agreement.



- c. Professional liability Insurance in an amount not less than Two Million Dollars (\$2,000,000) per claim covering losses arising out of an insurable error or omission in the rendering of, or failure to render, professional services in connection with this Agreement.

The Consultant shall be entirely responsible for the cost of any deductible that is maintained in any insurance policy.

The policies shown above shall be endorsed to provide the Town with not less than Thirty (30) Days written notice of cancellation, change or amendment restricting coverage.

The Consultant shall not commence work under this Contract until such time as evidence of insurance has been approved by the Town. The Consultant shall provide evidence of the continuance of this insurance at each policy renewal date for the duration of the Contract.

The Town reserves the right to request such higher limits of insurance or other types of policies appropriate to work as the Town may reasonably require.

The Consultant agrees at all times to comply with the Occupational Health and Safety Standards in the workplace and further agrees to adhere to Health and Safety Standards set out in applicable statutes and regulations and to comply with written Health and Safety Policies of the Town.

6.5.11 Payment Terms

The Town shall pay the successful Consultant on a monthly basis upon review and acceptance of monthly invoices complete with explanation of works completed and percent complete noted for each task, up to a maximum amount of the "Maximum Ceiling Price" as identified in the proposal.

A change in the fees may be considered only if the scope of the consulting work is changed at the request of the Town.

No additional payments will be considered unless authorized in writing by the Town.



*****PLEASE COMPLETE AND RETURN WITH PROPOSAL*****

Town of Wasaga Beach Comprehensive Branding Strategy

I have read, understood and am able to comply with all terms, conditions, specifications and instructions set forth in the attached “Request for Proposals.”

Date: _____

Name of Company: _____

Name of Company Representative: _____

Signature: _____

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Certification - No Conflict Of Interest

I/We hereby certify that there is not nor was there any actual or potential conflict of interest or unfair advantage in our submitting the Proposal or performing the Services required by the Agreement. In submitting the Proposal, our company has no knowledge of or the ability to avail ourselves of confidential information of the Town (other than confidential information which may have been disclosed by the Town to the Service Providers in the normal course of the Request for Proposals) where the confidential information would be relevant to the Services, their pricing or the Request for Proposals evaluation process.

Name Signature

Position Date