



Request for Proposals #STA2016-StratPlan

Undertake Consultation and Research to develop a Strategic Plan for the Stratford Tourism Alliance

Respond to: Kristin Sainsbury, Executive Director
ksainsbury@visitstratford.ca

47 Downie Street, Stratford, ON N5A 1W7
519-271-5140

Deadline for Submission: Friday September 9th, 2016, 12:00pm (Noon)

This document is formatted for double-sided printing

This page intentionally left blank

Table of Contents

1.0	GENERAL TERMS AND CONDITIONS	3
1.1	PURPOSE.....	3
	PROCESS:.....	3
1.2	PROPOSAL SUBMISSIONS	4
1.2.1	OWNERSHIP.....	5
1.3	IRREVOCABLE OFFER.....	5
1.4	BUDGET & PROPOSAL COSTS.....	5
1.5	CONTACT FOR REQUEST FOR PROPOSAL	5
1.6	SCHEDULE OF EVENTS.....	6
1.7	SELECTION PROCESS	6
i)	SELECTION	6
ii)	EVALUATION CRITERIA	6
1.8	REJECTION OF PROPOSALS	7
1.9	CONFIDENTIALITY	8
1.10	TERM OF AGREEMENT	8
1.11	PROJECT TIMELINE AND AWARD OF CONTRACT:.....	8
1.12	RESERVATION OF RIGHT	9
1.13	GOVERNING LAW.....	9
1.14	NEWS RELEASES.....	9
1.15	CONDITIONAL	9
2.0	PROJECT DETAILS.....	10
2.1	STRATFORD TOURISM ALLIANCE	10
3.0	PURPOSE.....	10
4.0	PROCESS AND DELIVERABLES.....	11
5.0	GOALS:.....	12
6.0	SCOPE OF WORK:.....	13
	REFERENCES	14

1.0 GENERAL TERMS AND CONDITIONS

Part 1 of this proposal document sets out a Summary of Requirements and outlines the General Terms and Conditions of this proposal.

The Stratford Tourism Alliance shall hereby be referred to as the “STA” throughout this document.

The Membership of the STA shall be referred to as “members” and key stakeholders will include (but are not limited to) the Museum, the Art Gallery, the Stratford Festival, City of Stratford, Town of St. Marys, Perth County, RT04, Stratford Summer Music.

1.1 Purpose

The STA is in the process of selecting an individual or firm to assist in the development of an organizational Strategic Plan. The successful Proponent must have extensive strategic planning and tourism industry experience, including the ability to conduct all required research, coordinate and facilitate the planning and engagement process, and create a strategic planning document(s) suitable for public review and presentation.

The Strategic Plan will broadly review tourism and consumer trends to address the question about the key focus, role and priorities for the STA in the next five years. The process will review the history of the STA, past studies, engage members and partners as well as key stakeholders to understand the STA value proposition, and to formulate a five year Strategic Plan for the organization to ensure strategic use of resources and key positioning to grow the tourism market.

Process:

- 1) Review past research, City of Stratford and STA key documents and RTO4 Destination Think report
- 2) Review past successes and challenges of the STA and industry best practices of DMOs in Canada
- 3) Situational Analysis - Assess the role of the STA in the shifting tourism landscape including understanding key industry trends and challenges
- 4) Survey members, past members and key industry players for background input into the process
- 5) Undertake roundtable session with the Board of Directors

- 6) Key informant interviews with identified key stakeholders (noted above)
- 7) Undertake a series of 5 focus groups potentially with the following groups to address key questions and test alternative solutions:
 - Bed and breakfast
 - Hotel/Motel
 - Retail
 - Restaurant & Culinary (including producers)
 - Arts, Culture & Events
- 8) Develop a Strategic Plan with Key recommendations for managing and growing the destination, organization and relevant key performance indicators.

1.2 Proposal Submissions

An electronic copy of your proposal must be received by Kristin Sainsbury, Executive Director, ksainsbury@visitstratford.ca no later than the date and time indicated on the cover page.

Proposals shall not be accepted after the closing date and time, and all proposals shall become the property of the STA.

Proposals should include consideration of project timeline, milestones, references, demonstration and examples of previous/similar work, proposed budget and an outline of key ideas that will formulate the foundation for a strategic plan.

It is the responsibility of each proponent to submit all required documents as outlined in this Request for Proposal. Failure to quote on all options set out will disqualify your proposal.

Proposals must be accompanied by proof of \$2M Liability Insurance for the firm and its principals.

1.2.1 Ownership

The completed strategic plan including research data will become the sole property of the STA, and no reproduction or distribution without authorized consent will be permitted.

1.3 Irrevocable Offer

The proponent hereby acknowledges that offers contained within your response to this Request for Proposal shall remain open for acceptance by the STA for a period of not less than thirty (30) days from the closing date of this Request for Proposal following the closing date and time specified on the cover page.

1.4 Budget & Proposal Costs

The STA and partners are not liable for any costs incurred by the proponent in preparing responses to this Request for Proposal or for any work performed prior to official appointment by the STA.

The project has an established budget of \$30,000 to complete the project as identified payable upon key milestones as noted in Section 1.6. A holdback of \$7500 of the project costs will be made until satisfactory completion of the Strategic Plan and all agreed upon deliverables have been completed.

1.5 Contact for Request for Proposal

It shall be the proponent's responsibility to clarify any points in question with the Executive Director prior to submitting the proposal. Responses to inquiries will be forwarded to all proponents. Inquiries should be directed to:

Stratford Tourism Alliance

Name: Kristin Sainsbury
Title: Executive Director
Telephone: 519-271-5140, x2224
Email: ksainsbury@visitstratford.ca

If a proponent discovers any inconsistency, discrepancy, ambiguity, error, or omission in this Request for Proposal, they must notify the STA immediately by e-mail.

Any revision to this Request for Proposal will be issued as an addendum to all proponents.

1.6 Schedule of Events

It is anticipated that the selection of the successful consultant will be made by September 30, 2016.

It is anticipated that the project will be completed by April 30, 2017.

Payment will be \$5,000 upon being selected to begin the project, \$10,000 at end of the First Research Phase, \$7,500 upon completion of the draft plan and \$7,500 upon completion of final plan.

1.7 Selection Process

The STA will not necessarily accept the lowest price or any proposal. Proposals will be selected and evaluated based on the following:

i) Selection

The consultant will be selected based upon evaluation criteria developed by the STA which in its sole discretion will determine the manner in which each response to this Request for Proposal meets the evaluation criteria.

ii) Evaluation Criteria

Each response to this Request for Proposal will be evaluated by the STA to determine the degree to which it responds to the requirements as set out. Because this is a Request for Proposal, other factors, in addition to price, will be considered when submissions are evaluated. Factors to be considered will include, but not necessarily be limited to:

1. **Completeness of submission and ability to address key requirements outlined in RFP.**
2. **Demonstrated Understanding and Methodology** as demonstrated by:
 - a. The proponent's ability to provide all of the deliverables specified as well as all other details requested in this proposal document.
 - b. Creativity in addressing the project
 - c. Proposed methodology
3. **Experience:**
 - a. The proponent's familiarity and experience with projects of similar size and complexity
 - b. Tourism Industry Experience
 - c. Experience working with DMOs
 - d. Creativity and uniqueness demonstrated through previous work

- e. Proven ability to deliver creative, original and high quality content
- f. Professional quality of previous work
- g. Business approach
- h. Project team composition and experience of principals
- i. Applicant qualifications
- j. Demonstrated Research skills
- k. Demonstrated facilitation skills to engage and retain quality input
- l. Ideas and plan for engaging stakeholders
- m. Overall capacity to deliver the project on time
- n. Familiarity with Stratford and the value proposition for Stratford as a destination

4. Services Offered/Value:

The submissions will be evaluated based upon the completeness and value of the project for the budget, including the ability to deliver all key components outlined in this RFP.

- 5. References/Interviews:** After initial review of the proposals, a shortlist may be created and interviews conducted. Interviews and reference checking will provide an opportunity to gage the fit of the firm for the project at hand. Proponents must provide minimum of three (3) references that demonstrate successful competency with comparable work for similar clients.

- 6. Price:** The maximum budget for the project is \$30,000, but proponents may offer competitive pricing that will be considered as part of the overall assessment. No proposals will be accepted that exceed the \$30,000 budget.

1.8 Rejection of Proposals

The proposal will be awarded to one firm or a collaboration of firms. The STA reserves the right to reject any and/or all proposals received. The STA is not under any obligation to award a contract, and reserve the right to terminate the Request for Proposal at any time for any reason, and to withdraw from discussions with all or any of the proponents who have responded. The receipt of a proposal does not constitute acceptance of any proposal.

1.9 Confidentiality

The STA agrees that the content of each response to this Request for Proposal will be held in the strictest confidence, and details of any response will not be discussed with any other party, except for the information made public by way of reports to the Board of Directors. Any information subject to the Freedom of Information and Privacy Act may be disclosed in accordance with the Act.

1.10 Term of Agreement

The successful proponent will undertake the project from September 30, 2016 to April 30, 2016. The consultant(s) will agree to the draft following project timeline that may be subject to change with agreement from both parties. Key meetings with the steering committee will be held at launch, following research phase to report findings and define focus groups, following focus groups and draft Plan.

1.11 Project Timeline and Award of Contract:

The timeline for the awarding of the contract and the project will be as follows:

Friday September 9, 2016	Proposals Due
September 16, 2016	Notification of Short List
September 22-23, 2016	Interviews
September 30, 2016	Contract Awarded
Week of October 3, 2016	Kick off Meeting with Advisory Committee
October-December 2016	Research Phase (Research, surveys & Key informant Interviews)
December 2016	Meet with Steering Committee – report preliminary findings
January/February 2017	Focus Groups
February 2017	Steering Committee Meeting - Focus group Findings and Strategy Formation
March 2017	Draft Strategic Plan – present to Steering Committee & Board of Directors
April 30, 2017	Final Plan

1.12 Reservation of Right

Proponents will not have the right to change conditions, terms or prices of the proposal once the proposal is submitted, nor shall proponents have the right to withdraw a proposal once it has been submitted.

The lowest cost or any proposal will not necessarily be accepted.

1.13 Governing Law

Any contract resulting from this Request for Proposal shall be governed by and interpreted in accordance with the laws of the Province of Ontario.

1.14 News Releases

News releases pertaining to this project shall not be made without prior approval by the STA.

1.15 Conditional

This project is conditional upon confirming project funding and may be cancelled prior to entering into a contract with the successful firm(s).



2.0 Project Details

The Stratford Tourism Alliance is hiring a consultant(s) to develop a strategic plan for the organization.

2.1 Stratford Tourism Alliance

The Stratford Tourism Alliance is the Destination Marketing Organization (DMO) for the City of Stratford. Located in southwestern Ontario, Stratford has a population of approximately 35,000 people and over 1 million visitors to the region each year. Home to the Stratford Festival—one of North America’s leading repertoire theatres, Stratford is a dynamic cultural arts destination that is well known in North America.



The STA has been operational as a not-for-profit corporation since 2007 with a mandate to deliver tourism marketing on behalf of the City of Stratford. The STA receives approximately 60% of its revenues from the City of Stratford and generates revenues from memberships, Destination Marketing Fees (DMF), partnerships and advertising revenues that support this mission. The STA has 5 full time employees and hires seasonal staff to support visitor services at two locations. The STA is responsible for marketing Stratford as a leading cultural destination utilizing a range of platforms (digital, web and print), for telling and communicating the value proposition for visitors to Stratford, for supporting members in promoting their businesses and events to improve the overall visitor experience, for staffing two visitor centre locations, monitoring trends and data related to tourism and for community leadership.

3.0 Purpose

The STA is in the process of selecting an individual or firm to assist in the development of an organizational Strategic Plan. The successful Proponent must have extensive strategic planning and tourism industry experience, including the ability to conduct all required research, coordinate and facilitate the planning and stakeholder engagement process, and create a strategic planning document(s) suitable for public review and presentation.

The Strategic Plan will broadly review tourism and consumer trends to address the question about the key focus and priorities for the STA in the future. The process will engage members and partners as well as key stakeholders to understand the STA value proposition, and to formulate a five year Strategic Plan for the organization to ensure strategic use of resources and key positioning to grow the tourism market. The following sections provide a key overview of the goals and deliverables that may be refined by the Committee in consultation with the successful candidate to achieve the desired outcomes.

Specifically the Strategic Plan will assess the following:

- Tourism Industry Trends and their potential impact on the STA
- Review the Mission/Mandate and core functions of STA
- Organizational review of the STA
- Challenges and Opportunities facing the STA
- Stakeholder issues and challenges
- DMO tourism review and Gap Analysis (opportunities as they relate to best practices and STAs current and future priorities and focus).
- Revenue generation review including (DMF)
- Identification of untapped revenue potential
- Identification of key priorities, projects and goals for the STA in workable action plan for the next five years to ensure sustainability with the following goals: (increasing revenues, growing tourism in the community, growing membership, increasing stakeholder loyalty and engagement)
- KPIs for monitoring and measuring impact/success

4.0 Process and Deliverables

- 1) Develop a work plan and timeline and submit regular progress reports
- 2) Review past research, City of Stratford and Stratford Tourism key documents and RTO4 Destination Think report
- 3) Review past successes and challenges of the STA and industry best practices of DMOs
- 4) Situational Analysis - Assess the role of the STA in the shifting tourism landscape including understanding key industry trends and challenges
- 5) Develop research methodology and Survey members and past members for background input into the process and identification of opportunities and barriers

- 6) Develop research methodology for engagement sessions, plan, coordinate and take minutes of engagement sessions and meetings with staff.
- 7) Undertake roundtable session with the Board of Directors
- 8) Key informant interviews with identified key stakeholders (some noted above)
- 9) Undertake a series of 5 focus groups potentially with the following groups to address key questions and test alternative solutions:
 - Bed and breakfast
 - Hotel/Motel
 - Retail
 - Restaurant/Culinary
 - Cultural Community
- 10) Develop a Strategic Plan with Key recommendations for managing the destination, organization and KPIs.

5.0 Goals:

By developing a Strategic Plan, the STA will have a roadmap for the next five years to guide its budgeting, prioritization of resources, member and revenue generation strategy and strategic priorities for the organization with clear Key Performance Indicators.

Specifically the goals of the Strategic Plan will be:

- Identify and communicate the value proposition of the STA
- Identify and communicate the value proposition of tourism as an economic driver in Stratford
- Confirm mission/mandate and focus for the STA
- Identify trends and service delivery areas that need adjustment to ensure that the STA can continue to be an industry leader
- Identify gaps and opportunities to build the sector in Stratford based on our mission/mandate;
- Identify opportunities for the STA to support and contribute to the growth of the Tourism Industry in Stratford
- Identify revenue opportunities that will maximize potential for the STA with a five year plan to increase revenues

- Identification of key priorities, projects and goals for the STA in workable action plan for the next five years to ensure sustainability with the following goals: (increasing revenues, growing tourism in the community, growing membership, increasing stakeholder loyalty and engagement)
- Promote awareness and appreciation of the STA and tourism

6.0 Scope of Work:

The selected consultant will work with the STA staff, Board and Steering Committee to create a strategic Plan that has long range components (objectives and priorities) and clear action plans for achieving the goals identified. Performance measures must be a feature of the plan to provide clear KPIs for ongoing reporting.

The STA understands there are a number of approaches that can be used to develop a strategic plan. The successful consultant must be able to adapt or customize an approach that will best meet the needs of the STA.

The consultant will be responsible for providing expert advice throughout the project and for the following deliverables (note that proponents are not limited by the deliverables and may wish to expand on them):

- Project Coordination - including regular meetings and status reports to keep the project on schedule and keep identified stakeholders apprised of the process;
- Member/Stakeholder/Employee Input - gathering of stakeholder information and input; using appropriate methods of communication and engagement;
- Research, Needs Assessment/Situational Analysis – reviewing existing plans and documents pertinent to the comprehensive strategic plan, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats, and industry best practices;
- Process and Meeting Facilitation – assisting discussion and decision-making; ensuring that conversations are forward-looking; action oriented and move the participants towards creating a shared future and continues to move Stratford forward as a leading destination in Canada;
- Plan Documentation – including creation of a final plan document (and Summary Document) for public review and presentation.

References

www.visitstratford.ca

Strategic Plan for the City of Stratford

RT04 Stratford Tourism Industry Reporting