

Regional Tourism Organization 7

Request For Proposals

to

Develop a 3-5 year Tourism Strategy and Action Plan

for

The Town of Saugeen Shores

Release Date: May 13, 2019

Deadline for Submissions: 12:00 pm (noon), June 3, 2019

Introduction

Regional Tourism Organization 7 (RTO7), on behalf of and in partnership with the Town of Saugeen Shores invites proposals to provide services for the development of a three to five year tourism strategy.

RTO7 is an independent, board-led, not-for-profit corporation funded by the Ontario Ministry of Tourism, Culture and Sport with a mandate to provide strategic leadership and work collaboratively with tourism partners and stakeholders to enrich the region's tourism industry. RTO7 markets and promotes the region as a destination under the BruceGreySimcoe brand.

This initiative is a joint partnership program undertaking between RTO7 and the Town of Saugeen Shores and will be overseen by a joint steering committee, comprised of RTO7 and Town of Saugeen Shores representatives. Note that subsequent contracts may be approved based on the successful completion of this project.

For further information about:

The Town of Saugeen Shores:

and

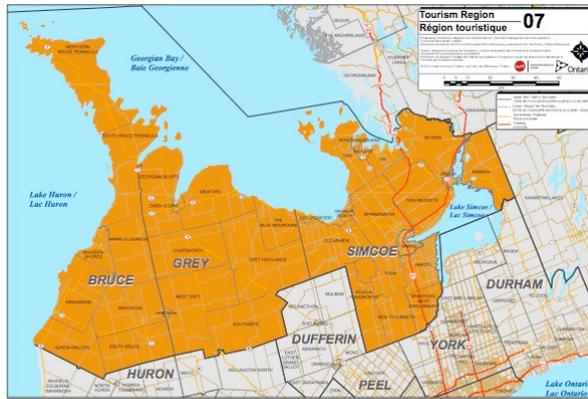
- RTO7 (industry site):
- BruceGreySimcoe (consumer site):

<https://www.saugeenshores.ca>

<https://visitsaugeenshores.ca>

www.RTO7.ca

www.BruceGreySimcoe.com



Deadline for proposal submission is: 12:00 pm (noon), June 3, 2019

Proposals must be submitted electronically (only) to:

Regional Tourism Organization 7

info@rto7.ca

1.0 Background

1.1 About Regional Tourism Organization 7

RTO7 provides strategic and collaborative leadership to build, sustain and grow tourism in the region comprised of Bruce, Grey and Simcoe Counties (BruceGreySimcoe). We are one of 12 RTOs – independent, not-for-profit corporations – to which the Ontario government provides annual funding to lead tourism planning, marketing and development in their respective regions. Some quick facts about BruceGreySimcoe tourism:

- Tourism across the region accounts for over 42,000* jobs that deliver millions more in economic outputs
- BruceGreySimcoe has in excess of 25,000 accommodation rooms, including hotels, motels, camping and RV sites, commercial resorts, cabins and B&Bs*
- There are over 400 attractions across the region, and over 600 festival and event days each year*

*OMAFRA EMSI Analyst query (2014) and **2010 AECOM Region Strategic Destination Plan (2010).

Our vision is to establish BruceGreySimcoe as Ontario's four-season destination of choice.

Our mission is to work collaboratively with tourism partners and stakeholders to build, sustain and grow visitation, investment and visitor spending.

1.2 Situational overview

In 2015, RTO7 began to action its new 2015-2018 strategic plan, from which the organization's ensuing years' business plans have been developed. Included in this plan were opportunities for the alignment of activities between RTO7 and its stakeholders. Our Partnership Program is a principal mechanism to accomplish this goal. RTO7 is supportive of stakeholders' efforts to validate strategic direction and goals through comprehensive, participatory planning processes which ideally establish a foundation for further, broader collaboration in future.

The Town of Saugeen Shores is a four-season destination along the beautiful shores of Lake Huron, south-west of Owen Sound and north of Kincardine, along Provincial Highway 21. It is the fastest growing community in Bruce County and is ranked as one of the best places to live in Canada. The community is conveniently accessible to Ontario's major urban hubs including Toronto, Guelph, Kitchener/Waterloo, Hamilton, London and Barrie. Home to MacGregor Point Provincial Park, the Saugeen Bluffs Horse Camp and Conservation Area, the Chantry Island Federal Migratory Bird Sanctuary and Denny's Dam Conservation Area; Saugeen Shores offers natural abundance with desirable, urban amenities close at hand.

Agriculture is the longest standing economic practice in the area, with beef and dairy farming, orchards, berries, and some large market gardens also in operation. Set among rolling pastures and forests, cut through by pristine creeks feeding into a large, beautiful river. Bordered on the west by one of the world's largest fresh water lakes over which world-renowned sunsets can be viewed in every season. A place where

the relaxed, cottage and camping life of sunbathing, fishing and trail riding mixes effortlessly with cutting edge business, high-paying jobs, high-end retail, arts and culture.

Business owners, young families and retirees are drawn to the growing and increasingly diverse community, attracted by an unparalleled quality of life and close proximity to major employers, including the world's largest nuclear generating facility, Bruce Power. Bruce Power is the largest employer in the region, with over 40% of their 4200-employee base living in Saugeen Shores. Bruce Power has begun the largest infrastructure project in Canada, with a plan to spend \$13 billion dollars. The Major Component Replacement project extends the horizon of the nuclear power plant, providing 30% of Ontario's power at 30% of the cost.

Saugeen Shores is becoming a center of excellence in the energy sector as numerous, nuclear industry suppliers choose to put down roots here. As this activity intensifies, our community will be increasingly at the forefront of innovation in low-carbon energy production. In 2018, construction value in the community increased 25%, and two new hotels will be coming online this year. This development, combined with world class communications, dedicated workers, exceptional transportation infrastructure and affordable operating costs makes Saugeen Shores the place to be for any business looking to expand, collaborate and grow.

There are two distinctly different urban cores within the municipality of Saugeen Shores. Downtown Southampton has the look of a quaint turn of the century fishing village and features a variety of retail stores and boutiques, restaurants and gift shops. In Port Elgin, the Main Street includes a mix of retail uses in addition to numerous gift shops, restaurants and grocery stores. Small businesses thrive throughout the community, and Saugeen Shores takes pride in fostering these with a pro-business climate.

The Lake Huron shoreline has attracted generations of summer residents, and tourism continues to have a major impact on the area. Travelers from all over the world visit Saugeen Shores to take advantage of the beautiful beaches, the fabulous attractions, and the world-renowned sunsets. The local population more than doubles during the summer, benefiting all businesses in the region. Highlights include the Chantry Island Lighthouse, built in 1859 and recently restored; the Bruce County Museum and Archive, recently renovated, which celebrates the people, heritage and culture of Bruce County, over 40 kms of trails for walking, running or cycling, and sandy beaches and warm water along 18 km of waterfront). The Rail Trail is popular with those who walk, cycle, and jog, cross country ski or snowshoe. Covering the 8-kilometre distance between Southampton and Port Elgin, the former railway bed has been converted into a green corridor for all types of non-motorized fun. Additional trails linking the community are being developed yearly as part of the Town's Parks and Trails Master Plan. For those who prefer motors, there are thousands of kilometers of snowmobile and ATV trails throughout Bruce and Grey Counties. The all-season McGregor Point Provincial Park is a delight to visit, with its complex eco-system. Enjoy a walk through silver maple swamps and cattail marshes in search of wildlife, or explore seven kilometers of waterfront. Winter visitors can camp out in one of the yurts and enjoy hours of cross-country skiing throughout the park. The Saugeen River is a number one destination for canoeists and kayakers from across Ontario. Stretching 102 kilometers from Hanover to Southampton, the Saugeen River is wide and slow moving in spots, with rapids and eddies in others; it provides a full range of experiences, including internationally acclaimed fly fishing. Lake Huron teems with fish species, including salmon, trout, pickerel and whitefish, and both sailing and power boating are accommodated in Port Elgin's safe harbour, while four local courses provide challenge to the golfer.

Throughout the year visitors and residents can enjoy the arts, culture and heritage of Saugeen Shores. Both the Chamber of Commerce and the Business Improvement Association are active in providing year-

round events. Among 45 events and attractions, Pumpkinfest annually draws thousands of visitors to the community during the first weekend of October. The annual Canadian Big Band celebration has kept the music of the Big Band Era alive in Saugeen Shores for more than a decade, while band shell concerts keep music lovers entertained through the summer. The Bruce County Museum highlights Bruce County's rich history, while the annual Southampton Craft show draws artists and crafts people from across Ontario. At the Southampton Art School, one of the province's oldest, most respected summer art schools, thousands of students have studied painting, drawing, sculpture, cooking, jazz and drama, and the Shoreline Artists' annual Studio Tour provides an interesting glimpse into the workspaces of some of the areas pre-eminent artists and craftspeople.

The Town of Saugeen Shores does not have a tourism strategy and action plan. A changing economy and changing tourism trends and landscape present an opportunity to review and enhance tourism services. Tourism is recognized as an economic driver for the Town, and in looking to the future the Town wishes to invest in a proactive strategy and action plan for tourism management that will review structures and efforts to date (a service contract is in place with the Saugeen Shores Chamber of Commerce through Community Services, however this agreement has not been refreshed in many years). Such a plan will also leverage existing and future opportunities in alignment with the Town's Corporate Strategic plan and tourism stakeholders within the Region, and enable the Town to budget and plan accordingly. Extensive input from the local tourism industry (and council and broader community engagement) will help ensure the long-term success and sustainability of such a plan and Saugeen Shores' tourism industry. A 3-5 year strategy is envisioned, identifying strategic priorities in the short, medium and long term, and laying out a three year action plan for the Town, including roles and responsibilities, deliverables and performance measurement.

1.3 Stakeholders

Town of Saugeen Shores tourism stakeholders may be broadly categorized into the following groups or audiences:

1. **Tourism operators:** private and not-for-profit enterprises spanning all tourism and hospitality sectors, i.e., resorts, accommodation, restaurant, retail, outdoor attractions, cultural attractions, and festivals and events. This includes many businesses (most notably in the food and retail sectors) that would not necessarily consider themselves part of the tourism industry.
2. **Tourism organizations:** publicly funded and/or member-based organizations with a role in some aspect of tourism promotion, development, marketing and/or management. This encompasses a range of organizations including the Town (staff and elected officials), the Chamber of Commerce, the Tourism Advisory Committee, Ontario Parks, Bruce County, RTO7, sector associations, etc.

1.4 Available Background Documentation

The municipality will make available the following research, data and surveys to help inform the secondary research process:

- a. Saugeen Shores Corporate Strategic Plan 2017
- b. Saugeen Shores Economic Development Strategy 2018
- c. The 2019 Experience Guide
- d. The Waterfront Master Plan
- e. The Recreation Master Plan
- f. The current agreement with the Chamber of Commerce to deliver tourism services

- g. The agreement with Tourist Town to deliver the web presence

In addition, the [Bruce County website](#) has tourism documents and reports which may be of assistance.

RTO7 will make available the following:

- a. RTO7 3 year Strategic Plan 2014
- b. RTO7 Winter Leisure Travel Study 2011
- c. RTO7 Festivals and Events Strategy 2014
- d. RTO7 OTMPC Consumer Insights Research
- e. Ministry of Tourism Culture & Sport (MTCS) Region 7 Profile 2017 (2016 data)
- f. Ontario Tourism Activity Reports 2015
- g. RTO7 Business Plan 2019/20
- h. RTO7 GBDDP International Travel Trade Market Development Plan 2014
- i. RTO7 Tourism Signage & Wayfinding Specifications & Standards 2018
- j. Tourism Workforce Report
- k. Consumer Image Study 2012
- l. Waterways Product Assessment
- m. RTO7 Sustainable Tourism Development Plan 2011
- n. Northern Bruce Peninsula Sustainable Tourism Action Plan

2.0 Scope of work

2.1 Requirements

The development of a comprehensive and sustainable 3-5 year tourism strategy and action plan is required to enable the municipality to make informed decisions regarding the Town's future investment in tourism and the best structure for local tourism delivery.

The plan will be based on solid research and will answer questions including, but not limited to:

- What are our ideal target audiences/markets, and what travel experiences are they seeking (including festivals and events, activities, attractions, accommodations and other tourism infrastructure and services);
- What product, experiences and events do we have to offer and how do those align with what is sought and what more is needed to further develop these existing assets?
- How can we work towards developing new products and experiences and events that meet the need?
- Where is investment needed to strengthen existing travel opportunities, creating new reasons to visit and giving visitors reasons to return again and again, throughout all four seasons?
- Which of a plethora of 'good tourism ideas' actually has the rationale behind it to justify sound decision-making?
- What potential issues or trends do we need to be aware of, and how might they be addressed?
- How can we proactively address sustainable development of tourism (e.g. beach use and accessibility), reflecting impacts on and needs of the environment, the residents and the business community in Saugeen Shores?
- Given a review of the provision of various tourism services, and related best practices, what tourism structure will be most effective in delivering upon all of the above?

- How might efforts of various departments/organizations be aligned in an effort to collaboratively identify gaps in service and to reduce duplication?
- What performance measurement is most suited to tracking the Town's tourism progress?
- What neighbouring relationships should be nurtured/leveraged e.g. neighbouring municipalities and/or operators that might represent sources of visitation and/or complementary tourism product, labour force, potential for shared infrastructure, etc.

The plan will need to achieve a collective understanding of, and support for, the strategy among stakeholders, including the community; as well as provide a framework for collaborative action that supports successful implementation of the plan within the region, articulating how all can align and engage in achieving the desired outcomes.

Specifically, the successful bidder will conduct the following at a minimum:

- 2.1.1 Liaise with the Steering Committee (SC) as required
- 2.1.2 Create a communications/dissemination plan at outset in consultation with SC to outline how the process and opportunities for input are best communicated
- 2.1.3 Review extensive consumer research (listed above in 1.4) which has been performed and will be provided to successful proponents
- 2.1.4 Design and facilitate a representative stakeholder engagement process to include participation from tourism operators and organizations active in some capacity in tourism both within and outside Saugeen Shores (at minimum one workshop and ten interviews (group and individual))
- 2.1.5 Conduct limited research of trends/best practices with respect to delivery of tourism services in 3 similar type communities (to be agreed upon)
- 2.1.6 Commit to a minimum 3-day on-site immersion, getting to know the municipality, operators and experiencing tourism assets
- 2.1.7 Provide at minimum a one-year action/implementation plan with detailed recommendations developed from the findings and insights and building on existing plans. Recommendations will be prioritized, broken down into tactics, identifying the responsible organization, a timeline, evaluation strategies (including methodologies), and including realistic minimum budget amounts required to realize each recommendation, as well as identifying opportunities to leverage funding
- 2.1.8 Evaluate recommended product, experiences and events (and related markets) in light of the three pillars of sustainable tourism - environmental, economic and socio-cultural impacts in developing the Action Plan (e.g. how might each recommendation impact these three pillars, in particular social impacts such as overcrowding?)
- 2.1.9 Present final recommendations/report to Council

Project deliverables include but are not limited to:

- 2.1.10 Brief bi-weekly progress reports to the RTO7 Project & Administration Manager
- 2.1.11 Presentation of interim findings/highlights to the Steering Committee
- 2.1.12 Provision and presentation of a draft 3-5 year Tourism Strategy, with at minimum a three-year action plan, to be reviewed by the Steering Committee

- 2.1.13 Provision of a final 3-5 year Tourism Strategy, with at minimum a three-year action plan (no later than December 31, 2019), including an Executive Summary
- 2.1.14 Presentation of final summary findings/highlights to Council (to be scheduled upon completion of project)

2.2 Critical path and timing

Date	Milestone
May 13/19	Release of this RFP
May 17/19	Deadline for submission of questions
May 21/19	Question responses published
June 3/19	Deadline for proposals
June 10/19	Notification of shortlist
w/o June 17/19	Finalist interviews and selection process completed
w/o June 24/19	Project kick-off meeting
Aug 2/19	Presentation of interim findings
Early - mid Sept/19	Draft report submitted to Steering Committee and presentation of draft report
Late Sept/19	Final report submitted
TBD	Final Council presentation
Dec/19	Saugeen Shores project reporting to RTO7

3.0 Terms and conditions

3.1 General terms and conditions

RTO7 reserves the right, at its sole option, and for its convenience, to accept and/or reject any proposal, in whole or in part, for any or no reason. By making this request for proposals (RFP) RTO7 does not imply or give any assurance whatsoever that any proposal will be accepted. No contractual or other legal obligations

arise on the part of RTO7 to any proponent by this RFP until such time as a final, written agreement, if any, is subsequently entered into with a proponent.

RTO7 may or may not award the business that is the subject of this RFP to any proponent or proponents at its sole discretion. RTO7 reserves the right to negotiate with proponents, seek clarification from proponents regarding their proposal responses and invite modifications to the proposal responses submitted. RTO7 also retains the right to withdraw or modify this RFP at any time without notice and without obligation to proponents. RTO7 may waive compliance with the requirements of this RFP and consider a proposal response that does not meet all of the requirements of this RFP.

Your proposal is submitted at your own risk. If, prior to the deadline for submission of proposals you fail to notify RTO7 of an error and your proposal is selected, you shall not be entitled to any compensation or time by reason of the error or its later correction.

No part of this RFP will become part of any final agreement between RTO7 and the provider unless specifically incorporated into a final, written agreement. Any or all contents of your proposal may become part of the final agreement. Further, your proposal response, including fees, shall constitute a binding offer capable of acceptance in whole or in part by RTO7, and if selected will remain valid until such time as a final agreement is negotiated and executed.

RTO7 shall not be in any way responsible for or liable for any costs associated with your proposal and you shall not make claim to RTO7 for any such cost or expenses. By submitting a proposal response, you agree to waive any right to claim damages against RTO7 for any reason, cause, or thing arising out of the RFP process.

Any contract awarded as a result of this RFP will be non-exclusive. RTO7 may, at its sole discretion, purchase the same or similar services from other sources during the term of the contract.

3.2 Potential for conflicts of interest

Each proponent, in their proposal submission, shall declare all conflicts of interest or any situation that may be reasonably perceived as a conflict of interest that exist now or may exist in the future. Failure to comply with this requirement will render the proposal non-compliant and will cause the proposal to be rejected. RTO7 reserves the right to disqualify from further consideration proposals that in RTO7's opinion demonstrate a conflict of interest.

3.3 Termination

In the event that the successful proponent, in the opinion of RTO7, fails to satisfactorily perform the services in accordance with the terms and conditions of the contract including the instructions to proponents, terms of reference and any other documented terms and conditions, RTO7 reserves the right to terminate services. RTO7 further reserves the right to terminate the contract without showing cause, prior to its conclusion, upon giving at least ten (10) days written notice to the successful proponent.

3.4 Terms of payment

Payment will be made in response to invoices in accordance with the final executed contract, provided the invoices are based on work/deliverables described in the scope of the project and are consistent with the

timetable of each negotiated deliverable, are completed to RTO7's satisfaction, and provided there exists no defaults of obligations.

3.5 Subcontracting and assignments

It is understood and agreed that the successful proponent will be an independent contractor. Any proposed subcontracting agreements must be approved by RTO7 and will not release you from any obligation with respect to the performance of your obligations.

3.6 Errors and omissions

RTO7 shall not be held liable for any errors or omissions in any part of this RFP. While considerable effort to ensure an accurate representation in this RFP, the information contained in the RFP is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

3.7 Indemnification

If you are selected you will be required to provide satisfactory proof of maintenance of relevant insurance coverage (including commercial, professional, general liability and automobile insurance).

The successful proponent shall indemnify and hold harmless RTO7, its Board of Directors, its officers and partners from and against all actions, claims, demands, losses, costs, damages, suits, or proceedings whatsoever which may be brought against or made and against all losses, liabilities, judgments, claims, suits, demands or expenses which may sustain, suffer or be put to resulting from or arising, out of the successful proponent's failure to exercise reasonable care, skill, or diligence or omissions in the performance or rendering of any work or service required hereunder to be performed or rendered by the successful proponent, its agents, officials and employees.

3.8 Confidentiality

In the performance of this contract, the successful proponent will not at any time before, during or after completion of the project, divulge any confidential information communicated to or acquired by you or disclosed by RTO7.

3.9 Acceptance of terms

By submitting a proposal you represent you have read, completely understand, and accept all terms and conditions of the RFP in full.

4.0 Submission requirements

4.1 Proposal guidelines

Your proposal must:

1. Be submitted electronically in PDF file. Your submission should not exceed 10 pages in length, plus Appendix.
2. Be accompanied by a cover letter / e-mail certifying the accuracy of all information contained in your submission and acknowledging your offer of services according to (a) the project scope as set out in Section 2.0; and (b) the terms and conditions as set out in Section 3.0.
3. Include responses to all questions in Section 4.2 below. Please cite each question in framing your responses and provide clear and concise answers.

4.2 Questionnaire

1. Provide a brief overview of your company including legal name, address and URL. Identify the representative authorized to negotiate on behalf of your company and include full contact information.
2. Provide a brief history of your company including years in business; describe its ownership and management structure, and its lines of business.
3. Provide a representative client list. Identify any past or current relationships with organizations located within the Counties of Bruce, Grey & Simcoe (RT07).
4. Identify project lead and key team members. Outline their roles and responsibilities and provide brief bios.
5. Describe your relevant qualifications and expertise with the planning and execution of tourism strategies/action plans of this nature.
6. Provide a minimum of three references from organizations that can speak directly to your expertise with respect to projects of a similar nature. References should be able to speak to experience with proposed project personnel. Include name, title and full contact information.
7. Outline your proposed approach to delivery referencing the requirements and desired deliverables and outcomes set out in Section 2.0. Indicate how you propose to achieve a credible and representative sample of stakeholders consulted in discussions.
8. Specify any assumptions.
9. Provide a quotation to support your response to Question #7 (the project is not to exceed **\$50,000** inclusive of taxes).

Clearly document your quotation basis and provide a cost breakdown as appropriate. Specify applicable hourly rates and any assumptions. Identify anticipated expenses and HST. In those instances where proponents are proposing to deliver services in partnership with other consultants, please identify in your proposal the lead proponent (who is in charge of oversight and who will sign the contract).

10. Provide any additional information you believe will be helpful in assessing your capabilities.

4.3 Evaluation criteria

Criterion	Weight
Credentials, qualifications and professional experience	20%
Demonstrated expertise and ability to meet requirements per proposal responses	30%
Quality of proposal and demonstrated ability and capacity based on client references	20%
Competitiveness of proposed fees and thoroughness of proposal	30%

4.4 Submission

It is your responsibility to seek clarification of any matter that you consider unclear before submitting your proposal by the deadline specified herein for submission of written questions. RTO7 is not responsible for any misunderstanding or misinterpretation of this RFP document or requirements.

To ensure you are apprised of any additional information as may be provided, please confirm your intention to submit a proposal upon receipt of this RFP.

Deadline for proposal submission is: 12:00 pm (noon), June 3, 2019

Proposals must be submitted electronically (only) to:

Regional Tourism Organization 7
info@rto7.ca