Request for Proposals

Brand Identity and Communication Strategy
File# 1220-20-59

District of Sicamous

DISTRICT'S REPRESENTATIVE:	Evan D. Parliament, Town Manager eparliament@sicamous.ca 446 Main Street PO Box 219 Sicamous, B.C. V0E 2V0
FINAL TIME AND DATE FOR RECEIPT OF PROPOSAL:	4:00 p.m. Pacific Standard Time Friday, February 19, 2016
ADDRESS FOR PROPOSAL SUBMISSIONS:	Evan D. Parliament, Town Manager 446 Main Street PO Box 219 Sicamous, B.C. V0E 2V0

Proponents must read the entire RFP document for full details and requirements.

THE DISTRICT RESERVES THE RIGHT TO CANCEL THIS RFP AT ANY TIME BEFORE OR AFTER THE CLOSING DATE AND TIME HAS PASSED, AND THE LOWEST PRICED, OR ANY, PROPOSAL WILL NOT NECESSARILY BE CHOSEN FOR NEGOTIATION OF A CONTRACT FOR SERVICES.

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PART A – PROPOSAL DETAILS

1.0 PURPOSE AND PROJECT OBJECTIVES

The purpose of this Request for Proposals ("RFP") is to solicit the best overall proposal for the provision of consulting services for the development of a brand identity, including a logo and visual identity guide, and a communication strategy for the District of Sicamous (the District). The District currently has an out-dated logo and tag line that do not reflect the community today as a beautiful, tourism-based centre. Sicamous Council has identified economic development as a strategic priority, which requires a brand and communication strategy that will support marketing initiatives and business investment campaigns. As well, there is a growing demand for improved communication and engagement with residents, businesses, visitors and community stakeholders, as well as internal communication with staff.

The brand strategy and visual identity guide need to reflect both the community of Sicamous and the local government as an organization. The communication strategy must provide guidance on how to improve communication and engagement while recognizing that the District has minimal internal resources or expertise. The District of Sicamous (the District) has identified the following objectives for this project:

- Gain insight into the brand promise for Sicamous based on the community as it is today as well as its aspirational goals for future tourism-based growth and business investment.
- Create a distinct, unique brand for the District that will attract investors, visitors and residents. The brand will be flexible to allow for application in marketing for businesses and tourism.
- Improve brand awareness of the District within the community, in target markets and within the organization.
- Obtain creative "building blocks" that can be used to produce future collateral and marketing campaigns.
- Improve and expand on communication and engagement with public and internal audiences through improved tactics, messaging and processes to:
    - Build community awareness
    - Improve customer service and accessibility
    - Maintain a high level of interest in District initiatives
    - Help foster broad based community support for District initiatives
    - Facilitate the flow of information sharing and engagement between various local and municipal audiences
    - Foster a consistent, professional image in all business dealings utilizing existing brand
    - Improve issues management and strategic communication.
- Establish a "Tool Kit" of public education and engagement material using the branding platform (i.e. Information on bylaws, building processes, recreation opportunities, tourism marketing, etc.)

The budget allocated for this project is $45,000-$60,000. Any proposals submitted pursuant to this RFP shall not be offers to contract for the provision of any of the services outlined herein, but shall only be used to identify a preferred Proponent with whom the District may negotiate a contract for the provision of the services.

2.0 REQUEST FOR PROPOSAL TERMINOLOGY & ENQUIRIES

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms:

2.1 Terminology

a) "District" means the District of Sicamous.

b) "Contract" means the written agreement resulting from the Request for Proposal executed by the District of Sicamous and the successful proponent.

c) "Contractor" means the successful proponent selected from this Request for Proposal.

d) "Must", "Mandatory" or "required" means a requirement that must be met in order for a proposal to receive consideration.

e) "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal.

2.2 Enquiries

Copies of the Request for Proposal are available from Mr. Evan D. Parliament or by email sent to eparliament@sicamous.ca. Questions regarding this Request for Proposal should be directed to Mr. Evan D Parliament or by email sent to eparliament@sicamous.ca.

3.0 BACKGROUND

3.1 The District of Sicamous

The District of Sicamous is nestled between Mara Lake and Shuswap Lake as represented by its current logo "Gateway to the Shuswap." The scenic beauty of mountains and crystal lakes are an attraction to both residents and visitors. The area boasts four distinct seasons for outdoor enthusiasts. Sicamous' ideal climate, central location and scenic setting ensure an exciting future. Incorporated in 1989, the District Sicamous is a young, growing community with a population of 2901 (2012 census) full time residents. The District supports a growing business community and young, stable economy.

Sicamous has established itself as a tourism-based community. With more than 200 rental houseboats available within the community, Sicamous has gained recognition as the "Houseboat Capital of Canada" and is a favoured destination for visitors.

Located approximately halfway between Calgary and Vancouver on the Trans Canada Highway, Sicamous is also the northern end of the Okanagan Valley. Situated adjacent to the channel between Shuswap and Mara Lakes, the Eagle River also runs through the community. All of these features combine to give Sicamous a spectacular natural setting and enables Sicamous to provide an abundance of outdoor recreational opportunities.

3.2 Local Government in Sicamous

The business of the District of Sicamous is conducted officially by the Municipal Council, which is comprised of a Mayor and six Councillors. All Council business is conducted at either Regular Council meetings or Special Council meetings, and all decisions are expressed either by a Council Resolution or a Bylaw. Many of the matters that Council must consider are forwarded for Council's consideration through the recommendations of the various Committees. Municipal staff carry out the instructions of Council based on the decisions, which are made at Council meetings.

The Town Manager is appointed by and reports to the Municipal Council. The Town Manager oversees the overall administration of the Municipality, its officers and employees.

In addition, the Town Manager is charged with keeping Council up to date on corporate matters, advising Council on policy and other matters and ensuring that Council policy is implemented. The Town Manager also leads the senior management team and sets the overall strategic direction for short and long term administrative goals

4.0 SCOPE OF SERVICES REQUIRED

4.1 Scope of Services Part One: Brand Strategy & Visual Identity

4.1.1 Brand Development Research, which will include:

- Brand Audit Review
  The District will supply existing brand guidelines, samples of existing corporate templates and marketing and promotional materials as well as previously conducted research and documentation, including a recent labour market study for the area, Council's strategic priorities, research portfolios for various District departments and the Official Community Plan.

- Discovery/Research
  The proponent will be expected to complete market research to gain insight into the brand strategy and visual identity for the community and the organization, including consultation with key District members and the community.

  Note: Although extensive information gathering and research is out of scope of this RFP, the Proponent may choose to supplement the proposal with efficient, focused and time-sensitive information gathering such as interviews with key personnel or stakeholders.

4.1.2 Visual identity design and guidelines, which will include:

- Brand Positioning
  The Proponent will develop the brand messaging and language to be used for the District of Sicamous, including how the community presents itself and how the organization's programs and services are described and identified. As part of this process, a simple document will be produced for internal purposes to clarify brand positioning by identifying for example, the brand essence, character, brand promise, key brand messages, audiences perceptions, and competitive position.

- Visual Identity Design
  The Proponent will create a brand visual identity based on the knowledge obtained through the branding and communications strategy process. The District's preference is to present to Council a final set of three (3) with a minimum of two (2) options that clearly and creatively reflect and present how and why Sicamous is a beautiful community to live in, visit and invest to all the audiences it serves and wants to serve.

- Brand Hierarchy
  The District of Sicamous brand will be the primary brand for the organization and the community. Under that primary brand, there may be a need for sub-brands for individual departments or specific marketing requirements such as tourism campaigns. These sub-brands need to be consistent with the primary brand, and the Proponents will be expected to provide recommendations on how best to accomplish this.

- Visual Identity Guidelines
  The visual identity guidelines document (or "Brand Book") will specify, articulate, and

depict the defining elements of the visual identity system and provide examples for marketing communications materials. For budgeting purposes, we are suggesting the following items to be included:

- Brand creative parameters (i.e. fonts, design styles, photo styles, colour palette, etc.)
- Acceptable and unacceptable uses of the brand
- Permission guidelines for logo use
- Samples of how the brand could be applied to website and social media pages.

- Template development
  Based on the brand identity and guidelines, create templates that can be used by the District for the following:
  - Corporate letterhead
  - Business cards – District Council and Staff
  - Corporate print ad template (e.g. Notice of Meetings)
  - Marketing print ad template (e.g. Recreation programs)
  - Recreation program brochure
  - Newsletter template

4.2 Scope of Services Part Two: Communication Strategy

4.2.1 Research Communication Audit

The proponent will be expected to:

- Review and analysis of existing communication policies and practices related to internal and external communication, Council relations, community engagement and media relations
- Review and analysis of existing communication strategies and tactics
- Complete market research to gain insight into organization requirements and audience needs for effective communication and engagement. (Note that this research component may be combined with the Brand Discovery/Research component.)

4.2.2 Communication Strategy Development

The proponent will be expected to:

- Update any existing communication policies and practices as required based on audit.
- Complete a communication strategy that addresses audience needs and communication messaging and tactics.
- Recommend tactics to support effective community engagement
- Recommend process changes to facilitate effective internal and external communication.

5.0 REQUIRED SUBMISSION CONTENT

In order to receive responses in a uniform format and to enable the fair evaluation of proposals received, Proponents should structure Item 2 identified on the *Proposal Submission Format* (Appendix A to this RFP) in the order outlined below, and provide the requested information, identifying each section by number.

Please provide:

5.1 Name and Address of Proponent

The corporate name, street address, mailing address, telephone number, fax number and e-mail address of the Proponent's company, and any branch locations or affiliates as may be applicable.

5.2 Proponent Overview

An overview of the Proponent's company including its size, years in existence, and an outline of the firm's experience in the area listed in this RFP.

5.3 Proposed Contract Administrator/Proponent Contact

The name of an individual who would be responsible for assigning and supervising services provided to the District pursuant to any agreements entered into following this RFP process.

5.4 Associates, Employees, Contractors of Firm

A list of partners, associates, other employees and any anticipated contractors who might be assigned or engaged to provide services to the District, the types of services that they might be involved in, and their specific qualifications and experience as they relate to those services.

5.5 References

A list of three (3) current or past clients to whom the Proponent has supplied services similar in nature to those listed in Section 3 and who may be contacted as references, including contact name and telephone number for each client.

5.6 Detailed Description of Service Provided

A detailed description of the services to be performed by the Proponent in developing and implementing the Brand and Communication Strategy as outlined in the Scope of Work and providing potential services that may be performed in the future.

Reference and describe in detail provision of the services listed in Section 4.1 and 4.2, including recommended methodology and work program to successfully achieve the objectives, key deliverables, and a timeline identifying milestones for the completion of each of the objectives. Reference and describe potential services the Proponent recommends to be provided, if any, and a detailed description of services or assistance, if any, the District would be expected to provide.

List and describe items that the District would be expected to provide toward completion of the project.

5.7 Additional Information

Any additional information that the Proponent wishes the District to consider in the evaluation of its proposal.

5.8 Fee

The fee and all associated costs specified separately for Section 4.1 and Section 4.2. Fees may be described as an hourly rate, with an estimate of the all found cost, or as a lump sum.

Provide a fee and all associated costs, including taxes, for items outside scope of this Request for

Proposal.

5.9 Timeline

Provide a detailed timeline for completion of the project. It is intended that the project will be concluded by September 30, 2016, with the following key milestones:

- Research outcomes for Brand and Communication Strategy
- Brand Positioning Report
- Visual Identity Design Concepts Development
- Recommendations for Communication Strategy based on research outcomes
- Finalization of Visual Identity Design – Presentation to Council
- Development of Visual Identity Guide (Brand Book) and templates
- Completion of Communication Strategy – Presentation to Council

6.0 EVALUATION

Evaluation of proposals will be undertaken by the Selection Committee. At the sole discretion of the Selection Committee, a short list of the highest scored proponents will be developed, including reference checks. Proponents on the short list may be invited to make a presentation to the Selection Committee and/or Council. The final selection will be based on the District's determination of the best scoring and approval by Council.

6.1 Mandatory Criteria

The proposals will be evaluated and rated based on both the Mandatory and Desirable criteria set out in this Request for Proposal document.

- Proposals must be in English, and the Proposal must be submitted by the appropriate date and time;
- Proposals must contain responses to information requested in section 4.0 based on the criteria of this Request for Proposal document to demonstrate ability to carry out the terms of the contract, delivery of a quality product and/or service within an appropriate budget.
- Proposals must clearly list, in detail, what services will be provided with the associated costs for each component.
- Responses must contain a list of references of past projects and work of this nature, with contact names and telephone numbers.

6.2 Scoring

Responses will be evaluated against the Submission Requirements. The evaluations will be weighted as follows:

Criteria	Points
Company profile/qualifications	20
Relative experience and references	20
Approach	25
Knowledge of local government	20
Pricing	15
Total	100

The District reserves the right, in its sole discretion to clarify any Response without becoming obligated to offer the same opportunity to any other Proponent(s). The District, as a result of this RFP process, has no obligation to establish a shortlist of Proponents and reserves the right to reject any and all submissions.

PART B - ADMINISTRATION

7. GENERAL TERMS AND CONDITIONS:

7.1 District Representative

Only the Town Manager, for the District of (the "District's Representative") is authorized to communicate and otherwise deal with Proponents. The District's Representative will answer all questions in writing and will provide a copy of all questions and their answers to each Proponent who has provided contact information and a written intent to submit a proposal.

7.2 Right to Cancel RFP and/or to Accept Proposals

This RFP is solely a request for proposals for the provision of the outlined services. It is not an invitation for tenders, an offer to contract, or an invitation for offers capable of acceptance to create a contract. Submission of a proposal by any Proponent and its subsequent receipt by the District does not represent a commitment on the part of the District to proceed further with any Proponent.

No contractual or other legal obligations or relationship between the District and any other person can or will be created prior to the termination of this RFP process, or otherwise, except in a written contract executed by authorized signatories of the District.

The District is entitled to cancel this RFP at any time by written addendum issued to those Proponents that have notified the District in writing of their intent to submit a proposal, without liability for any loss, damage, cost or expense incurred or suffered by any Proponent as a result of that cancellation.

In considering any proposals delivered in response to this RFP, the District reserves the absolute and unfettered discretion to assess, accept or reject any or all proposals.

The District may require clarification after the dates and times set out in this RFP from any one or more of the Proponents in respect of proposals submitted.

The District may communicate with, meet with, or negotiate with any one or more of the Proponents respecting their proposals or any aspects of the services outlined herein.

7.3 Confidentiality of Proposals

The District will receive all proposals submitted in response to this RFP in confidence, including for the purposes of section 21 of the *Freedom of Information and Protection of Privacy Act*, R.S.B.C. 1996, c. 165. The District cannot and does not guarantee that information contained in any proposal(s) will remain confidential if a request for access to proposals is made under the *Act*.

If a Proponent considers that any part of its proposal is proprietary, including by reason of protection by copyright, the proposal must clearly identify those portions considered proprietary.

7.4 Waiver of Liability for Errors

The District has used considerable efforts to ensure an accurate representation of information in this RFP. However, the District accepts no responsibility for the accuracy or completeness of this RFP (including any schedules, appendices or addenda) and no representation or warranty, express or implied, is made or given by the District with respect to the accuracy or completeness of the RFP (including any schedules, appendices or addenda).

7.5 Proponent's Risk and Warranty

Each Proponent is solely responsible for the risk and cost of preparing and submitting its proposal in response to this RFP and neither the District nor its officials, employees or consultants (including the District's Representative) are liable for the cost of doing so or obliged to remunerate or reimburse any Proponent for that cost.

The sole risk, responsibility and liability connected with reliance by any Proponent or any other person on this RFP is that of each proponent.

7.6 Confidentiality of District Information

This RFP is the property of the District and is not to be copied or distributed without prior approval of the District Representative referred to in section 7.1.

Any information acquired about the District by a Proponent during this process must not be disclosed unless authorized by the District, and this obligation will survive the termination of this RFP process. The awarding of any contract or the reaching of any agreement for the provision of services to the District will not permit any Proponent to advertise a relationship with the District without the District's prior authorization.

8. SUBMISSION OF PROPOSALS

8.1 Time and Date for Receipt of Proposals

Three (3) complete copies of each proposal (no 3 ring binders please) plus one loose, single-sided copy for copying, together in a sealed single envelope clearly marked as described below, must be received by the District before 4:00 p.m. local time, Friday, February 19, 2016.

Attention: Evan D. Parliament, Town Manager
District of Sicamous
446 Main Street
PO Box 219
Sicamous, B.C. V0E 2V0

Proposals received after the time and date specified will be rejected as being invalid and will be returned unopened to the Proponent courier collect.

All proposals and subsequent information or material received shall become the property of the District and shall not be returned. The District reserves the right to make extra copies of the proposals for use during the selection process only.

8.2 Submission Format

All proposals must be submitted to the District in hard copy form outlined in Appendix A to this RFP. Electronic submissions such as facsimile or electronic mail will not be accepted.

Envelopes containing submitted proposals should be clearly marked "CONFIDENTIAL" with the full name and address of the Proponent, the RFP title, and the closing date and time noted in section 8.1 of this RFP.

8.3 No Amendments to Proposals After Submission

A Proponent shall not be permitted to change the wording or contents of a proposal after submission to the District, unless requested to do so by the District for the purpose of clarification.

8.4 Withdrawal of Proposals

Any Proponent may withdraw its proposal, either personally or by written request to the District Representative, at any time prior to the scheduled closing date and time noted in this RFP.

9. EVALUATION

9.1 Evaluation Committee

Proposals will be reviewed and evaluated by a committee comprised of District staff. Proponents may be invited to give written or oral presentations and/or to participate in interviews with the committee.

9.2 Evaluation Criteria

Proposals will be evaluated based upon, but not limited to, in no particular order:

- Compliance with the RFP document, including provision of all information requested in section 4 of the RFP;
- Demonstrated ability to provide services in, and proven expertise in, the areas required by the District as listed in this RFP;
- Qualifications, experience, and professional development of the Proponent's staff, and in particular those staff proposed to be generally handling the project;
- Reference checks.

10. SELECTION OF MANAGEMENT CONSULTING SERVICES PROVIDER

10.1 Budget

The District's budget range for the Request for Proposal is $45,000 to $60,000 exclusive of tax. The selected candidate may be requested to complete other communication projects outside the scope of this Request for Proposal.

10.2 Negotiation with Preferred Proponent

The District may select one or more preferred Proponents as a result of this RFP process, and may enter into negotiations with the preferred Proponent(s) in an attempt to settle the agreement necessary to implement the services generally described in this RFP. Proponents must commit to negotiate in good faith with the District if chosen as a preferred Proponent.

10.3 Contract for Services

The District may, at its sole discretion, enter into a written contract with any one of the Proponents for the provision of the services generally described in this RFP. There shall be no agreement, and no Proponent shall acquire any legal or equitable rights or privileges with respect to this RFP or the services in question, until such time as a written contract has been duly executed by the signing authorities of the Proponent and of the District.

Any response to this RFP may become part of any contract entered into with a successful proponent.

10.4 Compliance with Laws

Proponents are solely responsible for complying with all applicable Federal, Provincial or Municipal legal requirements including the requirement of or for any permits, licenses, fees, taxes or other legal requirements that would ordinarily be required for the implementation or operation of the service.

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors.

10.5 No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the District, including the evaluation committee and any elected officials of the District, or with members of the public or the media, about the project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by the District.

APPENDIX A

Proposal Submission Format

Please submit each copy of your proposal in the following format:

1. Title Page:

Showing RFP title, Proponent's name and address, closing date and time, and Proponent's contact person and telephone number.

2. One page letter of introduction:

Signed by an authorized signatory.

3. Proposal:

Include a short (one or two page) summary of the key features of the proposal and ALL information requested in Section 5 of the RFP.

4. Appendices:

Any attached firm brochures, work samples or other materials that demonstrate expertise and related work experience.