

Regional Tourism Organization 7

Request For Proposals

to

Develop a 3-5 year Destination Development Action Plan

for

The Town of Wasaga Beach

Release Date:

January 29, 2018

Deadline For Submissions:

12:00 pm (noon), February 16, 2018

Introduction

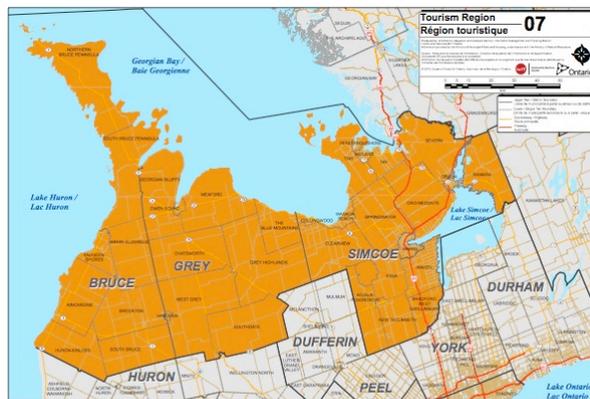
Regional Tourism Organization 7 (RTO7), on behalf of and in partnership with the Town of Wasaga Beach, invites proposals to provide services for the development of a three to five year destination development plan for the Town.

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 funding program undertaking between RTO7 and the Town of Wasaga Beach and will be overseen by a joint steering committee, comprised of RTO7, Town of Wasaga Beach representatives, and the County of Simcoe (who are joint funders of the project), and others. Note that subsequent contracts may be approved based on the successful completion of this project.

For further information about:

- The Town of Wasaga Beach: www.wasagabeach.com and www.wasagabeachtourism.com
- RTO7 (industry site): www.RTO7.ca
- BruceGreySimcoe (consumer site): www.BruceGreySimcoe.com



Deadline for proposal submission is: 12:00 pm (noon), February 16, 2018

Proposals must be submitted electronically (only) to:

Regional Tourism Organization 7
info@rto7.ca

1.0 Background

1.1 About Regional Tourism Organization 7

RT07 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 13 RTOs – independent, not-for-profit corporations – to which the Ontario government provides approximately \$38 million in 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 December 2014, RT07 completed a 3 year strategic plan, from which the organization's ensuing years' business plans were developed. Included in this plan were opportunities for the alignment of activities between RT07 and its stakeholders. Partnership funding is a principal mechanism to accomplish this goal. RT07 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.

Nestled on the southern end of Georgian Bay, recognized as one of Ontario's most beautiful recreation areas, Wasaga Beach is home to the world's longest freshwater beach offering 14 kilometres of sand beach, warm clean water, a panoramic view of the Blue Mountains across the bay, a scenic river and a dramatic sand dune system; all surrounded by acres of natural parkland known as Wasaga Beach Provincial Park. Wasaga Beach is within a two hour drive from Toronto, 45 minute drive from Barrie and a 30 minute drive from Blue Mountain Resort.

Visitors come to Wasaga Beach to enjoy the vast variety of recreation opportunities, suitable for all seasons, including trails for hiking, cycling and running as well as golfing, sports fishing and other water sports. Winter activities include several kilometres of groomed snowmobile trails, cross-country skiing, snowshoeing and winter hiking. Wasaga Beach is located a short 30-45 minute drive from four alpine/downhill ski resorts.

The quality of life and a safe, friendly community has attracted a steady stream of new residents and seasonal dwellers over the years. Wasaga Beach's population has recently exceeded 20,000. The

community offers dining, shopping, nightlife and many special event opportunities, including a daily summer market with free family-friendly entertainment.

Wasaga Beach has long been hailed a premier tourism destination in Ontario and Canada. In 2007 a Tourism Strategy was prepared to assist the Town in becoming more proactive in growing the tourism sector. For the past decade this has been the guiding document for growing tourism in Wasaga Beach.

In 2011 the Town developed a Special Events Strategy that resulted in improvement of both the quality and quantity of tourism events. However, the tourism and events industries have experienced significant changes in the past 10 years that must be considered as part of an overall strategy. In 2015 a Tourism and Events Advisory Committee was established to provide strategic advice to Council on issues and opportunities to support the growth, development and promotion of events and tourism as economic, community and cultural drivers in Wasaga Beach.

In order to revitalize the tourism industry and bring to market the level of product that today's visitors expects, the town is moving forward with the development of a downtown and redevelopment of the beachfront, the town's major tourism asset.

Through a Downtown Master Plan the Town developed a framework that will guide public and private investment in Downtown Wasaga Beach. The Town has begun implementation and will be taking several steps in the coming years in order to ensure that the Downtown is realized. The plan focuses on two key districts: Lower Main and the Beachfront Districts.

Affectionately named "The Heart", Lower Main will become the centre of Wasaga Beach's year round residential population and serve as the community's social gathering place - a place to live, work and play. Lower Main is characterized by a concentration of employment, retail and residential units in a compact mixed-use form that will create the critical mass of people and uses to create a vibrant and successful core. Lower Main is walkable in scale where the majority of daily trips can be undertaken on foot or on bicycle. While placing an emphasis on the pedestrian, Lower Main will also be a multi-modal hub.

Envisioned to bring back the "Fun" to Wasaga Beach, the Beach District will be the entertainment activity centre of Wasaga Beach. Taking a cue from its cultural heritage, the Beach District will bring back family and indoor entertainment to diversify the activities offered ensuring that the beach is a dependable destination through bad weather and through the off season. By strengthening the beach as a destination, the town reinforces the synergy held between the beach and town to create a sustainable entity.

The town is well positioned to redevelop, with a clear direction and strategic approach to developing the destination as a whole and in conjunction with the present opportunity to evolve and regain its position as one for the best destinations in Ontario and Canada.

Tourism is a cornerstone to Wasaga Beach's economy. It is also often people's first introduction to an area they may later choose to relocate to. Extensive input from the local tourism industry (and broader community engagement) will help ensure the long term success and sustainability of such a plan and Wasaga Beach's tourism industry. A 3-5 year plan is envisioned, with strategic priorities identified - some low hanging fruit, some challenging but achievable plans and some ambitious reaches.

1.3 Stakeholders

Town of Wasaga Beach 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 (Festivals & Events as well as permanent and seasonal residents), Chambers of Commerce, Ontario Parks, the Georgian Triangle Tourist Association, the County of Simcoe, 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. *Tourism Strategy 2007*
- b. *Special Events Strategy 2011*
- c. [*Downtown Development Master Plan 2016*](#)
- d. *Wasaga Beach Community Profile 2018*
- e. *Active Transportation Plan 2008*
- f. *Community Hub Visioning and Programming 2018*
- g. *Tourism Simcoe County Workplan 2018*
- h. *Wasaga Beach Provincial Park Boundary Map*
- i. *Wasaga Beach Provincial Park Beach Management Secondary Plan, 2017*
- j. *Prizm Analytics Visitor Profiles 2017*
- k. *Google Analytics – WasagaBeachTourism.com*
- l. *Facebook and Twitter Analytics*
- m. *Tourism Asset Mapping*

In addition, 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 2014 (2012 data)
- f. Ontario Tourism Activity Reports 2015
- g. RTO7 Business Plan 2017/18
- h. RTO7 GBDDP International Travel Trade Market Development Plan 2014
- i. RTO7 County of Grey and Township of Oro-Medonte Cycling Research
- j. RTO7 Tourism Signage & Wayfinding Specifications & Standards 2017

- k. Tourism Workforce Report
- l. Visitor Analysis Study 2012
- m. Waterways Product Assessment
- n. RTO7 Sustainable Tourism Development Plan 2011

2.0 Scope of work

2.1 Requirements

The development of a comprehensive and sustainable 3-5 year destination development plan intended to increase visitation and visitor spending is required. 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 experiences do we have to offer (existing and potential to develop) and how do those align with what is sought?
- How market-ready is the product on offer and what more is needed to develop it further?
- How can we work towards developing offerings (new products and experiences) that meet the need? Where should we start?
- What new tourism and community-oriented Festivals & Events (F&E) should we be investing in?
- 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 ideas' actually has the rationale behind it to justify sound decision-making?
- How can the development of Downtown be supported through destination development?
- Where and how can we best reach identified target markets with an annual marketing budget of \$60,000-\$100,000?
- 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 (e.g. ensuring adequate/available parking) that balances the needs of the environment, the residents and the business community in Wasaga Beach?
- How do we know we're making progress/achieving success?
- 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 layers of government and industry at the national, provincial, regional, county and municipal levels can align and engage in achieving the desired outcomes.

By identifying the above, Wasaga Beach will be better positioned to grow tourism and realize the highest economic impact and return on investment.

Note that as a separate but complementary project following this initiative, the Town will be undertaking a review of the effectiveness of Wasaga Beach's current brand in reaching ideal visitors and undertaking a

rebranding strategy to ensure that the brand is strategically positioned to appeal to the ideal visitor and is aligned with Downtown redevelopment efforts.

As the branding project will build upon this initiative, it is imperative that this project is delivered on time i.e. the final report delivered no later than July 31, 2018.

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 Creation of 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. This research provides considerable opportunity for mining of detail and therefore a large-scale primary consumer research component is not a part of this proposal.
- 2.1.4 Design and facilitation of a representative stakeholder engagement process to include participation from tourism operators and organizations active in some capacity in tourism both within and outside Wasaga Beach (at minimum a community meeting and two days of stakeholder interviews – individual and group)

Project deliverables include but are not limited to:

- 2.1.5 Short (1-page) bi-weekly progress reports to the RTO7 Manager of Projects & Administration
- 2.1.6 Presentation of interim findings/highlights to the Steering Committee
- 2.1.7 A draft Tourism Destination Development Action Plan, including a high-level marketing strategy
- 2.1.8 Validation of the draft strategy with stakeholders
- 2.1.9 A final Tourism Destination Development Action Plan (no later than July 31, 2018), including an Executive Summary. Note that the strategy should include at minimum a one-year Action Plan, outlining specific tactics to achieve each strategy, responsibility and timelines. The Action Plan should be a detailed 'how-to' document – e.g. if pursuing Sports Tourism is a strategic action (example only), the plan should outline which sports in particular and how specifically that might be achieved. It should also not duplicate existing successes e.g. seeking out hockey tournaments may not make sense if the arena is already busy on weekends. Finally, the plan should recommend measures of success against which ongoing performance may be monitored.
- 2.1.10 Presentation of summary findings/highlights to stakeholders (to be scheduled upon completion of project)

2.2 Critical path and timing

Date	Milestone
Jan 29/18	Release of this RFP
Feb 9/18	Deadline for submission of questions
Feb 12/18	Question responses published
Feb 16/18	Deadline for proposals
Feb 26/18	Notification of shortlist
Mar 1-8/18	Finalist interviews
Mar 9/18	Selection process completed
w/o Apr 2/18	Project kick-off meeting
May 30/18	Presentation of interim findings
Early July/18	Draft report submitted to Steering Committee
July 31/18	Final report submitted
TBD	Final stakeholder presentation
Mar/19	Wasaga Beach 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 (RTO7).
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 destination development 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/public consulted in discussions.
8. Specify any assumptions.
9. Provide a quotation to support your response to Question #7 (the project is not to exceed **\$80,000** 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), February 16, 2018.

Proposals must be submitted electronically (only) to:

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