



**TOWN OF LUNENBURG
RFP #TOL2024013**

**REQUEST FOR PROPOSALS
Sustainable Cultural Tourism Plan**

Proposals will be received no later than:
2:00 p.m. LOCAL TIME
Friday April 26th, 2024

Addressed to:
Cali Beck, BBA, PCP, PSPP
Procurement Officer
Town of Lunenburg
119 Cumberland Street
PO Box 129
Lunenburg, NS B0J 2C0

TABLE OF CONTENTS

Contents

1.0 GENERAL TERMS AND CONDITIONS.....	3
1.1 Purpose.....	3
1.2 Proposal Submissions.....	3
1.3 Irrevocable Offer.....	4
1.4 Proposal Costs.....	4
1.5 Municipal Contact for RFP	4
1.6 Opening.....	4
1.7 Selection Process.....	5
1.8 Modification and Withdrawal of Proposals.....	6
1.9 Acceptance and/or Rejection of Proposals and Reservation of Rights.....	6
1.10 Governing Law and Jurisdiction	7
1.11 Proposal Form.....	7
1.12 Freedom of Information and Protection of Privacy Act	7
1.13 Insurance Requirements	7
1.14 Conflict of Interest	7
1.15 Nova Scotia Worker's Compensation.....	8
1.16 Human Rights Act	8
1.17 Ownership of Data and Information.....	8
2.0 SPECIFICATIONS AND REQUIREMENTS	8
2.1 Background and Overview	8
2.2 Scope of Work.....	8
2.3 Proposal Deliverables	10
2.4 Project Deliverables	11
3.0 PROPOSAL FORM.....	13

1.0 GENERAL TERMS AND CONDITIONS

Section 1 of this proposal document sets out a summary of requirements and outlines the general terms and conditions. The Town of Lunenburg shall be referred to as the "Town" throughout this document.

1.1 Purpose

The purpose of this RFP is to commission a comprehensive Sustainable Cultural Tourism Plan for Lunenburg. The plan will assist policymakers in making informed decisions that integrate economic, social, and environmental considerations, supporting sustainable and inclusive economic development in Lunenburg. Additionally, the plan will provide valuable insights for government, businesses, and the creative/cultural sector to inform priorities and collaboration and leverage investment and funding opportunities. The successful proponent will create a plan that will guide cultural tourism development and aid in its early implementation, ensuring a strategic approach to fostering cultural tourism in Lunenburg.

Old Town Lunenburg, a designated World Heritage Site, embraces a comprehensive understanding of culture, encompassing both tangible and intangible heritage. Its designation acknowledges its historical significance, architectural integrity, and cultural heritage, emphasizing its role as a vibrant testament to the maritime legacy of Nova Scotia and Canada. The Cultural Tourism Economic Impact Study and Sustainable Cultural Tourism Plan for Lunenburg must encompass historic sites, events, and the town's tourism economy, including accommodations, restaurants, and marine activities such as shipbuilding, the fishery, and recreational boating. The study should evaluate various sectors, including events, tours, retail, hospitality, accommodations, and historic sites and museums.

1.2 Proposal Submissions

Any change notices, appendices and addenda issued for this RFP shall be considered part of this proposal document. The proposal is to be submitted, clearly marked with **"Sustainable Cultural Tourism Plan"** and proposal document number **TOL2024013**, to Cali Beck, Procurement Officer by email exclusively to purchasing@townoflunenburg.ca before the Closing Time on the closing date. Proponents must submit one (1) PDF copy via email. Erasure, overwriting or strikeouts must be initialled by the person signing on behalf of the Proponent. Proposals will not be accepted after Closing Time. The Town shall have the right in its absolute and unfettered discretion to determine whether a proposal has been received prior to the Closing Time. Proposal prices must remain open and available for acceptance by the Town for 120 days after the Closing Time. All proposals shall become the property of the Town of Lunenburg. It is the responsibility of each proponent to submit all required documents as outlined in this RFP. Failure to quote on all options set out may disqualify your proposal.

1.3 Irrevocable Offer

The proponent hereby acknowledges that offers contained within your response to this RFP shall remain open for acceptance by the Town of Lunenburg for a period of not less than 120 days from the Closing Time specified in Section 1.6. Proponents may not make modifications to their Proposals after the Closing Time.

1.4 Proposal Costs

The proponent shall be solely and fully responsible for all costs associated with the development, preparation, transmittal, submission of proposal, and any work performed before official appointment by the Town of Lunenburg.

1.5 Municipal Contact for RFP

The proponent shall be responsible for clarifying any points in question with the Town of Lunenburg before submitting the proposal. The deadline for all inquiries is April 22nd, 2024, at 4:30pm. Inquiries regarding the specifications of the RFP and the RFP process should be directed to:

Name: Cali Beck
Title: Procurement Officer
Email Address: purchasing@townoflunenburg.ca

If a proponent discovers any inconsistency, discrepancy, ambiguity, error, or omission in this RFP, they must notify the Town of Lunenburg immediately in writing.

Any revision to this Request for Proposal will be issued as an addendum to all known potential Proponents.

Please check the Town website townoflunenburg.ca/purchasing.html to determine if any addendums have been issued prior to the submission deadline.

1.6 Opening

Proposals will only be received by:

Name: Cali Beck
Title: Procurement Officer
Email Address: purchasing@townoflunenburg.ca

One (1) PDF copy of your proposal must be received by email or prior to **2:00 p.m.** local time, **Friday April 26th, 2024**. Proposals will be signed by an official authorized to bind the document. Proponents will provide the name(s), title(s), address, and telephone

number of the individual(s) to be contacted during the evaluation process. Proposals received later than the specified Closing Time may be returned unopened to the Proponent.

There will not be a public opening for this RFP. As this is a proposal document for which several criteria will be evaluated, the names of the proponents who have submitted a proposal will be identified after the opening, upon request.

1.7 Selection Process

Selection – Subject to Section 1.9 of this RFP, the Town will not necessarily accept the lowest priced or any proposal. Any implication that the lowest priced or any proposal will be accepted is hereby expressly negated. The successful proponent(s) will be selected based on evaluation criteria developed by the Town, which in its sole discretion, will determine the manner in which each response to this RFP meets the evaluation criteria. The proposal may be awarded to one proponent or more as the Town sees fit.

Evaluation Criteria – Subject to Section 1.9 of this RFP, each response to this RFP will be evaluated by the Town to determine the degree to which it responds to the requirements as set out herein. Because this is an RFP, other factors besides price will be considered when evaluating submissions.

Please indicate any requirements not met in your proposal with a brief description and reasons therefor.

The Town will read, review, and evaluate each proposal. The below evaluation criteria table should be used as a reference only. The Town may in its sole and absolute discretion use or alter the below criteria or use some other evaluation criteria entirely.

Evaluation Criteria	Percentage
Expertise – Knowledge and experience of the proposed project team.	15%
Experience – Experience undertaking similar projects in other municipalities	15%
Innovation – Evidence of the team's ability to propose creative and effective solutions that have been implemented and shown positive results	15%
Community Engagement – Knowledge and experience in public engagement, including working with multi-disciplinary teams	15%
Comprehensive Methodology – The strength of the proposed methodology, including data collection, analysis, and public engagement processes.	10%
Value for Money	20%
Project Timeline	10%
TOTAL	100%

Shortlisted candidates may be interviewed.

1.8 Modification and Withdrawal of Proposals

Proposal prices must remain open and available for acceptance by the Town for 120 days after the Closing Time. Proponents may not make modifications to their proposals after this. Proponents will not have the right to change the conditions, terms, or prices of the proposal once the proposal has been submitted in writing to the Town. All proposals shall become the Town's property. It is the responsibility of each proponent to submit all required documents as outlined in this RFP.

1.9 Acceptance and/or Rejection of Proposals and Reservation of Rights

The Town is not obligated to award a contract and reserves the right to terminate this RFP at any time for any reason and to withdraw from discussions with all or any of the proponents who have responded. The receipt and opening of a proposal do not constitute acceptance of any proposal.

The Town reserves the right to reject all proposals and not necessarily accept the lowest-priced proposal. The Town may accept any proposal that may be considered in the best interests of the Town in its sole and absolute discretion. The Town also reserves the right in its sole and absolute discretion to waive any formality, informality, or technicality in any proposal. This includes the right to accept a proposal that is not strictly compliant with the instructions in the RFP document.

The Town reserves the right to negotiate, after the RFP Closing Time, with any Proponent to finalize service arrangements in the Town's best interests.

The Town shall not be bound by trade or custom in dealing with and/or evaluating the responses to the RFP. The Town reserves the right to interpret any and all aspects of this RFP as may be most favorable to the Town.

Proponents will be deemed to have familiarized themselves with existing conditions and any other conditions which may affect performance of the contract. No plea of ignorance of such conditions as a result of failure to make all necessary examinations will be accepted as a basis for any claims for extra compensation.

Proponents waive any claim against the Town for compensation of any kind whatsoever as a result of its participation in or providing a response to this RFP process, including without limitation any claim for costs of proposal preparation or participation in negotiations, or for loss of anticipated profits, whether based in contract including fundamental breach, tort, equity, breach of any duty, including, but not limited to breach of the duty of fairness, breach of any obligation not to accept non-compliant proposals or any other cause of action whatsoever.

In submitting a proposal, the proponent has accepted the reservation of rights as set out herein and agrees to be bound by same.

1.10 Governing Law and Jurisdiction

Any contract resulting from this RFP shall be governed by and interpreted in accordance with the laws of the Province of Nova Scotia. Any disputes shall be determined in the courts of Nova Scotia.

1.11 Proposal Form

The attached Proposal Form (3.0) must be completed and submitted with all proposals for consideration. Failure to complete and submit the proposal form could lead to the rejection of the proposal.

1.12 Freedom of Information and Protection of Privacy Act

The Town of Lunenburg is subject to the Municipal Government Act provisions relating to the freedom of information and protection of privacy provisions Freedom of Information and Protection of Privacy Act (FOIPOP) and associated Provincial legislation. Any proposal submitted to the Town may be required to be disclosed publicly if any request is to be made under FOIPOP. All proposals received in response to this RFP will be considered public.

1.13 Insurance Requirements

The successful proponent shall at its own expense obtain and maintain until the completion of the contract and provide the Town with a Certificate of Insurance providing proof of:

- a) Professional Liability insurance covering the work and services described in this Agreement for an amount not less than \$2.0 Million per occurrence;
- b) Comprehensive General Liability insurance for an amount not less than \$2.0 Million per occurrence;
- c) Automobile Liability insurance for an amount not less than \$2.0 Million covering all vehicles used in any manner in connection with the performance of the work described in this RFP.

1.14 Conflict of Interest

The proponent warrants that no conflict of interest exists with any Town staff, Council or Committee member regarding their RFP submission or with the Town's evaluation process. Should a conflict of interest exist or arise, the Town at its sole discretion may disqualify the proposal submission and/or contract as applicable.

1.15 Nova Scotia Worker's Compensation

The successful proponent must be registered and remain in good standing with NS WCB throughout the term of a contract issued pursuant to this RFP.

1.16 Human Rights Act

The successful proponent shall ensure full observance of the NS Human Rights Act in all dealings related to this project.

1.17 Ownership of Data and Information

All data, other information and all resulting reports and materials prepared by the successful Proponent shall be the exclusive property of the Town who reserves ownership rights to all ideas, plans, concepts, etc.

2.0 SPECIFICATIONS AND REQUIREMENTS

2.1 Background and Overview

The Town of Lunenburg is soliciting proposals for the development of a comprehensive Sustainable Cultural Tourism Plan as part of Tourism Atlantic's (ACOA) Strategic Tourism Expansion Program (STEP). This initiative, embedded within the STEP framework, aims to empower Atlantic Canadian communities to envision long-term tourism development strategies. With over twenty communities already benefiting from STEP, the program emphasizes sustainable, experiential tourism aligned with community input. For Lunenburg, this project offers an opportunity to foster a sustainable tourism destination, promoting resilience, health, and prosperity for the wider community. The successful proponent will work closely with the consultant conducting a Cultural Tourism Economic Impact Study for the Town (see RFP TOL2024014). Team submissions are encouraged.

2.2 Scope of Work

The Town of Lunenburg seeks a certified STEP consultant to facilitate the development of a community-led Sustainable Cultural Tourism Plan. The consultant will collaborate with the Town, its STEP Committee, and the successful proponent under RFP TOL2024014 to integrate community feedback and insights into the plan, guiding tourism development over the next three to five years. The plan must include achievable recommendations for building sustainable tourism which are reflective of the community's stated goals. The successful proponent will work closely with the consultant conducting a Cultural Tourism Economic Impact Study for the Town (see RFP TOL2024014). Team proposals are encouraged.

The successful proponent under RFP TOL2024013 will work with the Town to complete the following key deliverables:

1. Research: Stay apprised of the resource mapping and economic research undertaken by the successful proponent under RFP TOL2024014.
2. Collaborative Vision Development: Establish and nurture a community network comprising leaders, entrepreneurs, and stakeholders actively involved in plan development and execution. Facilitate sessions to uncover the community's vision for cultural tourism development, integrating input from stakeholders and identifying collective strengths and assets. The consultant will ensure thorough community engagement in the STEP process and the development of an actionable Sustainable Cultural Tourism Plan reflective of the community's vision and goals.
3. Strategic Direction: Provide leadership in developing achievable recommendations aligned with community goals, ensuring the plan reflects the ambitions of the community. Analyze global, national, provincial, and regional tourism trends and recommend strategies for resilience in response to fluctuations.
4. Experiential Tourism Development: Identify, enable, and facilitate the development of experiential tourism offerings tailored to Lunenburg's unique cultural landscape.
5. Capacity Building: The STEP facilitator will provide the leadership, guidance and direction required to ensure that the community meets the intended outcomes – including a strong understanding of:
 - A replicable economic impact methodology.
 - The collective strengths and assets of the town, and the role it can play in furthering the vision for cultural tourism development as articulated by community stakeholders.
 - The processes and abilities required to develop and implement an integrated and actionable Sustainable Cultural Tourism Plan, which captures the ambitions of the community.
 - The importance of developing and establishing a community network comprised of community leaders, entrepreneurs and other stakeholders who are actively engaged in the development and execution of a Sustainable Cultural Tourism Plan.
 - How changing tourism trends (global, national, provincial and regional) affect the tourism industry and approaches for resiliency as these fluctuate.
 - The skills and expertise required to identify, enable, and facilitate the development of experiential tourism.

This work will culminate in the development, delivery, and presentation of an achievable Sustainable Cultural Tourism Plan.

2.3 Proposal Deliverables

The proposal shall include the following:

1. Cover Letter: A signed cover letter by a company officer authorized to execute a contract with the Town.
2. Project Work Plan: Detailed description including a statement of understanding, research, analysis, work approach, and methodology for the Cultural Tourism Economic Impact Study and Sustainable Cultural Tourism Plan. This should encompass specific tasks, options, or alternatives, presented with a Gantt chart outlining key tasks, milestones, meetings, presentations, sequence, duration of each task, and personnel assigned with anticipated hours devoted. The Work Plan must clearly indicate all meetings, their type (i.e., in-person versus virtual) and duration. It is expected that the final plan will be completed no later than 9-12 months of the commencement date and follow-up will take place at 3-, 6- and 12-months post-plan completion.
3. Demonstrable Experience: Certified STEP Consultants must demonstrate:
 - Understanding of the STEP Program goals, objectives, and proposed approach to work with the Town of Lunenburg, the STEP Committee, and wider community.
 - Understanding of the Lunenburg community's tourism economic landscape, assets, challenges, and opportunities.
 - Experience in working with volunteer boards of directors, community groups, and committees.
 - Leadership and motivational skills, along with experience in leading multidisciplinary teams and facilitating diverse stakeholders.
 - Experience working with municipalities on similar projects.
 - Specialization in cultural tourism and/or experience in historic communities an asset.
4. Case Studies and References: Provide a list of relevant projects completed, sample documents, and contact information for three references (names, positions, telephone numbers, and email addresses) who can attest to the quality of similar work performed.
5. Key Contacts and Personnel: Identification of key contacts for the project, along with all personnel and subcontractors assigned. Include descriptions of relevant qualifications and experience.
6. Resource Support and Additional Information: Identification of any Town staff or other resource support required, as well as additional information the Proponent will seek to complete the RFP components.
7. Proposed Budget: Presentation of proposed budget and breakdown of costs and expenses related to the project. This should include a charge-out rate list for all Proponent staff and relevant subcontractors, along with their assigned tasks and hours as per the project work plan. The budget must specifically outline in two separate sections:

- Costs and expenses specific to professional time and supplies required for all components of the STEP Program.
- Costs specific to travel and related expenses, including estimates for air or ground travel, accommodations, meals, and miscellaneous travel expenses. Estimates for air travel should be based on current economy class fares, while mileage and meals must not exceed current Government of Canada allowances and per diems.

2.4 Project Deliverables

The successful proponent shall be responsible for the following project deliverables:

1. Project Kick-Off Meetings:

- Consultation with ACOA and Town staff to review the STEP approach and program nuances.
- In-person meeting with the Town of Lunenburg and the STEP Committee to finalize objectives, scope, timelines, and milestones.

2. Development of Detailed Work Plan:

- The STEP facilitator will develop a detailed work plan that satisfies the requirements of the STEP model. Facilitators are encouraged to be flexible to community needs and opportunities as they arise, however, the process will follow the general format of STEP
 - STEP 1 – Introduction (Month 1-2)
 - STEP 2 – Setting the Stage (Month 3)
 - STEP 3 – Destination Planning (Month 4-5)
 - STEP 4 – Draft Sustainable Cultural Tourism Plan and Introduction to Capacity Building Sessions (Months 6-7)
 - STEP 5 – Sustainable Cultural Tourism Plan Presentation and Capacity Building Session (Months 8-9)
 - STEP 6 – Final Sustainable Tourism Plan Presentation and Capacity Building Session (Month 10-12)
 - STEP 7 – Follow-up and Mentoring (Months 13-24 with established check points at months 3, 6 and 12)

3. Community Engagement, Network Establishment and Capacity Building:

- Establishment of a community network comprising leaders, entrepreneurs, and stakeholders actively involved in plan development.
- Ensuring community engagement throughout the process to reflect community goals.
- Either through capacity building sessions or resource identification and coordination the facilitator will support operators in the region with tactics to meet emerging trends reflective of local assets and community opportunities.

4. Collaborative Vision Development:

- Facilitation of sessions to establish the community's vision for cultural tourism, integrating stakeholder input and identifying collective strengths and assets.

5. Strategic Direction:

- Leadership in developing achievable recommendations aligned with community goals.
- Analysis of global, national, provincial, and regional tourism trends, proposing strategies for resilience.

6. Experiential Tourism Development:

- Identification and facilitation of experiential tourism offerings tailored to Lunenburg's cultural landscape.
- Specific and tangible recommendations and insights into emerging consumer expectations.

7. Final Sustainable Cultural Tourism Plan:

- Cultural Tourism Plan document analysing tourism trends, proposing strategies for resilience and outlining achievable recommendations aligned with community goals.
- Submission of a final report meeting ACOA's standards in Microsoft Word format, with all reports and supporting documentation.
- Presentation of completed Sustainable Cultural Tourism Plan to Town Council.
- The successful proponent will be responsible for providing all necessary materials including drafts and other materials for review.

8. Ongoing Training, Mentoring, and Support:

- Provide ongoing training, mentoring, and support to key stakeholders, community leaders, and entrepreneurs involved in the implementation of the Sustainable Cultural Tourism Plan.
- Offer guidance and assistance as needed to ensure the successful execution of the plan's strategies and initiatives.
- Facilitate capacity-building sessions to empower local stakeholders with the skills and knowledge necessary to sustain and enhance the cultural tourism initiatives beyond the project timeline.
- Offer mentorship opportunities to encourage continued learning and growth within the community, fostering long-term sustainability and resilience in cultural tourism development.

3.0 PROPOSAL FORM

NAME OF PROPONENT: _____

Do not include HST in the Amount of Proposal. All of the below pricing is to be in Canadian Dollars.

Amount of Proposal..... \$ _____
HST..... \$ _____
Total..... \$ _____

Please attach the following additional information:

- Start and end time required to complete the work.
- Proof of current WCB coverage.
- Certificate of Insurance for \$2.0 million General Commercial Liability Insurance.

Mailing Address _____

Phone Number _____

Email Address _____

Signature _____

Print Name & Title _____

Date _____

Witness _____

Date _____

Details of Proposal – please attach your submission details as required in this RFP.