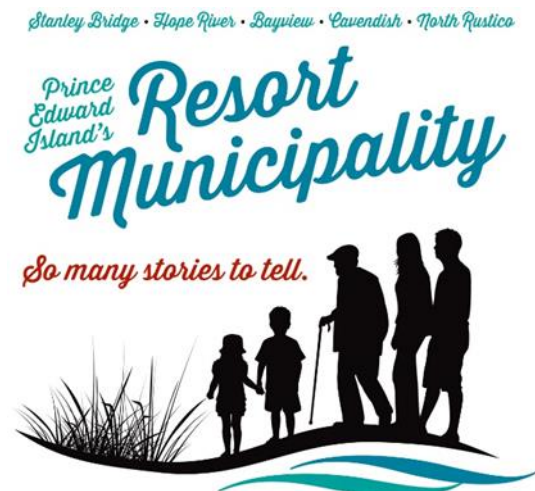


REQUEST FOR PROPOSAL

L. M. Montgomery Literary Tour Development

For

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish
and North Rustico



Closing: February 12, 2019 at 12:00 pm (noon) local time.

Issued January 22, 2019

REQUEST FOR PROPOSAL

L. M. Montgomery Literary Tour Development

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico ("the Municipality") is seeking proposals from qualified individuals/ firms to provide for the establishment of a literary tour focused on the life and works of L. M. Montgomery. The selected firm will undertake the concept creation and writing to establish the first ever literary tour, here on Prince Edward Island.

The literary tour will be developed to celebrate the life and contributions of L. M. Montgomery and consider locations both operational and natural across the province. The literary tour will be developed as an addition to previous and future research. Branding is presently being conducted to offer guidance in the overall development.

Sealed Proposals, one (1) unbound and duly signed copy or one (1) in digital format on flash drive or sent by email are to be submitted and labelled **L. M. Montgomery Literary Tour Development, Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico** and delivered to 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0

All questions concerning the procurement process shall be directed to Brenda MacDonald, CAO of the Municipality, Monday through Friday, 8:30 A.M. to 4:30 P.M. by E-mail to resortmunicipal@eastlink.ca.

The Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever in its opinion best serves the interest of the Municipality.

SECTION 1. INSTRUCTIONS TO PROPONENTS

1. General Instructions

This Request for Proposal ("RFP") document and any addenda may be obtained in person or by mail from Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0 or by E-mail at resortmunicipal@eastlink.ca.

All proposals are to be submitted in accordance with this RFP document and are to be submitted in sealed, plainly marked envelopes. Proposals sent by facsimile or e-mail will not be accepted.

Additional information or clarifications of any of the instructions or information contained herein may be obtained from the CAO.

Any Proponent finding any discrepancy in or omission from this RFP, in doubt as to the meaning of any provision(s) herein, or feeling that the RFP is discriminatory, shall notify the Municipality in writing within five (5) days of the scheduled opening of proposals. Inquiries and exceptions taken by Proponents in no way obligate the Municipality to change the RFP; however, any interpretations given by the Municipality and any changes made to the RFP will be reflected in addenda duly issued by the Municipality.

The Municipality will assume no responsibility or liability for oral instructions or suggestions. All official correspondence regarding the RFP should be directed to the CAO.

All proposals must be signed by an authorized signatory of the Proponent.

The Municipality reserves the right to make additional copies of all or part of each Proponent's proposal for internal use.

Proposals will be publicly acknowledged. Proponents will be advised of the results after an evaluation of all proposals has been completed and a successful Proponent has been determined.

2. Eligibility

Prospective Proponents are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of the Municipality, give rise to conflict of interest in connection with this RFP or the services required. Proponents are to submit with their proposal documents a description of any issue that may constitute a conflict of interest violation for review by the Municipality. The Municipality's decision on this matter will be final.

Individuals and entities engaged by the Municipality to draft any component of this RFP (and anyone affiliated with such individuals and/or entities) are not eligible to submit proposals for this RFP.

3. Proponent's Qualifications

No contract will be awarded except to responsible Proponents capable of providing the services.

Proponents must be primarily engaged in providing the services as outlined in this RFP.

Proponents must have an extremely comprehensive understanding of the subject matter in this RFP. Such understanding and previous experience in all aspects of similar projects are essential criteria in the qualifying process. The Municipality reserves the right to consider past performance on contracts in the evaluation of a Proponent's qualifications.

Proponents must have a proven record of having provided similar services. The Municipality reserves the right to check all client contacts furnished and to consider the responses received in evaluating proposals.

Proponents must use personnel and management knowledgeable in their areas of expertise. The Municipality reserves the right to perform investigations as may be deemed necessary to ensure that competent persons will be used in the performance of the Services.

4. Reservations

The Municipality reserves the right to reject or accept any or all proposals or parts of proposals. The Municipality may waive formalities or technicalities in proposals as the interest of the Municipality may require. The Municipality may waive or correct minor errors, omissions and inconsistencies in proposals provided they do not violate the proposal intent.

Under no circumstances shall the Municipality be liable for any losses or damages arising from the Municipality's rejection or acceptance of any proposal for any reason whatsoever. Notwithstanding the foregoing, the Municipality's liability for any losses or damages resulting from the Municipality's failure to fulfill any of its explicit or implied obligations under the RFP, including the Municipality's acceptance of a non-compliant proposal, or the Municipality's awarding of a contract to a non-compliant Proponent shall in all circumstances be limited to the lesser of actual damages suffered or \$1,000.00

5. Proponents Expenses

Proponents are solely responsible for their own expenses in preparing, delivering or presenting a proposal.

6. Exceptions

The submission of a proposal shall be considered an agreement to all the terms and conditions provided herein. Any proposal containing exceptions to the terms and conditions of the RFP or the resulting contract may be rejected by the Municipality for non-compliance. Any request for changes to the terms and conditions of the RFP or the resulting contract must be made in writing to the Municipality prior to the date of closing. Only if the Municipality issues a formal addendum to the RFP will any changes to the RFP or resulting contract be effective.

7. RFP Administration

All questions concerning the procurement process shall be directed to Brenda MacDonald, CAO of the Municipality Monday through Friday, 8:30 A.M. to 4:30 P.M. by E-mail to resortmunicipal@eastlink.ca.

8. Existing Conditions

Each Proponent must completely satisfy themselves as to the exact nature and existing conditions of the requirements and for the extent and quality of the services to be performed. Failure to do so will not relieve the successful Proponent of their obligation to perform the services in accordance with the provisions of the contract.

9. Questions

The Proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open. Questions should be directed in writing to the contact identified in this document. Email is the preferred method of contact. Verbal questions and responses that are not later confirmed in writing will not be considered an official response.

Questions and responses that are deemed to affect the RFP requirements, project scope, time lines, etc. or to be of interest to Proponents may be made available via Addenda at the discretion of the Municipality.

10. Addenda

Any addenda issued by the Municipality shall be posted on the Government of PEI tendering website at:

<https://www.princeedwardisland.ca/en/tenders>

The Proponent must monitor the website for any addenda that may be issued during the full open period of the RFP. The submission of a proposal shall be deemed to indicate that the Proponent has read, understood and considered all addenda posted to the Government of PEI tendering website prior to the closing date and time.

11. Currency and Taxes

Prices are to be quoted in Canadian dollars, and exclusive of HST.

12. Public Information/Proprietary Information

The Municipality is committed to full transparency. Any document submitted to the Municipality in response to this RFP is subject to this principle and Proponents should be aware that any member of the public is entitled to request a copy of the document. In response to such a request, the Municipality may disclose some or all the information of the proposal.

The Municipality may, in the future, be subject to new provincial requirements creating obligations for

the Municipality and its service providers when personal information is collected, used or disclosed.

By submitting a proposal, the Proponent agrees that the Municipality may disclose the following sections of the proposal without notification to the Proponent:

1. Form of Proposal
2. Executive Summary
3. Proponent's fixed total cost (if applicable)

13. Period of Submission Validity

Unless otherwise specified, all proposals submitted shall be irrevocable for ninety (90) calendar days following the closing date.

14. Surety

Bid Surety, Performance Surety and/or Labour and Materials Surety may be required in relation to this RFP and the resulting Contract.

15. Disputes

In cases of dispute as to whether an item or service proposed meets the RFP requirements, the decision of the Municipality shall be final and binding.

16. Proposal Submission

The submission of a proposal will be considered as a representation that the Proponent has carefully investigated all conditions which may affect or may, at some future date, affect the Proponent's performance of the services as described in this RFP and that the Proponent is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; also, that the Proponent is familiar with and will abide by all Federal and Provincial laws and regulations and all bylaws and policies of the Municipality which in any way affect the performance of the Services or persons engaged or employed in the performance of the services.

SECTION 2. REQUEST FOR PROPOSALS

1. Project Background

L. M. Montgomery is an international literary icon. Her most famous novel *Anne of Green Gables* was written in Cavendish, Prince Edward Island and published in 1908. Cavendish is the home of numerous sites related to Montgomery, her life and her work.

As researchers have shared their understanding of her life as written in her journals and with the arrival of a new television series, Montgomery is also now becoming more recognized as a woman ahead of her time, who was, in her own way a feminist and who faced many challenges of her own.

The Municipality has a goal to celebrate and recognize Montgomery and all that touched her, including Cavendish itself and the Island as a whole. To this end, it has established a committee to redevelop a Heritage Park and develop a Literary Tour. The Park is an important and strategic piece of public open space functioning as the southern gateway into the community. It links public sidewalks from the Cavendish cemetery, trails from Green Gables Heritage Place, and an entrance into the original homestead of L. M. Montgomery. Green Gables Post office is also nearby. Central to this larger project is the establishment of a statue of Montgomery to be installed in the Heritage Park. This should be viewed as the launching point for the creation of the new literary tour.

2. Goal

The goal is to develop an internationally recognized literary tour, which offers visitors the opportunity to absorb and understand the inspirations and life of Montgomery, as interpreted through the writings contained in her books and journals. *Anne of Green Gables* has continued to be the most successful or widely recognized book, but it is important to celebrate the author behind this great book. Many visitors are unaware of L.M. Montgomery and the literary tour will provide an opportunity to enhance the experience for visitors and allow them to see Cavendish and Prince Edward Island through L.M. Montgomery's eyes. It is important that the tour offer variations that take into account time and distance to complete. This will offer visitors and tour groups, options for both a shorter compact tour in Cavendish, along with a much more comprehensive tour, including all of PEI.

The literary tour sites/participants will be selected based on a previously agreed upon criteria and adjudication process. Participants will be expected to sign a Memorandum of Agreement which will be reviewed annually. The participants should be selected at the beginning of the project. They should be considered, and properties consulted throughout the development of the tour. It is our vision that there be a true partnership within the group of properties and a desire to develop a world class tour.

It is expected that Proponents will:

- Develop a literary tour concept based on input and research, and using examples of currently established and successful tours worldwide
- Develop the necessary writing that should be used to articulate the tour and each of the

included properties. It is anticipated that there will be between 10 and 15 properties.

- Develop both an option for a localized Cavendish Tour, Island Tour and the potential for an à la carte option.
- Determine and create the best forms of collateral to guide and inform visitors.
- Determine the best forms of technology to guide and inform visitors but create a web site as a minimum.
- Develop on-site markers to designate inclusion within the literary tour for each participating property on the tour. The Proponent must consider National Park guidelines, Municipal signage and P.E.I. provincial government signage laws when considering the appropriate options. Preliminary branding will be provided.
- Develop messaging and signage for the Heritage Park to establish the literary tour. Signage should be considered in various art forms and not strictly in the form of information panels. It is expected that there should be 4 to 6 messages throughout the Park as well as a map of the tour.
- Evaluate tour branding and expand on its inclusion in the tour.
- Liaise with the Anne of Green Gables licensing authority, stakeholders, the Committee and both federal and provincial partners to obtain feedback throughout the process. The Committee or Proponent will also liaise with the Heirs of Montgomery.
- All materials should be developed in English first to obtain approval from the Committee then followed by French, Japanese, and Mandarin.
- Recommend different languages for inclusion in the tour and messages found within the Heritage Park including but not limited to the collateral, technology and product location identifiers/markers.
- Develop Memorandum of Agreement.
- Develop materials, much like a tool kit or checklist, to assist individual operators, selected for the tour to be market ready. These materials should provide a clear understanding of their role and responsibilities in the literary tour. The material must help to assess the property's needs to meet the expected standards and ensure each property is in line with expectations. Expectations should be drawn from the Memorandum of Agreement participants will be expected to sign. The material should include a review of store front information and appearance on the web and social media, etc. There should be some consistency in the information provided by participants' online presence and such standards will need to be developed.
- Develop and deliver one, or more if necessary, working sessions to deliver the above and ensure participants' understanding and buy-in for the tour.
- Submit all materials for content revision and fact-checking before publication in any form whether print, digital or otherwise.
- Prepare a budget for tour participants to ensure sustainability, maintenance, reprints and so on.
- Prepare exit strategies and mitigation plans for participants wanting to exit the tour.

3. Objectives/Critical Path

The Municipality has scheduled all work to be completed by June of 2019.

4. Requirements

The successful Proponent must have demonstrated experience in

- New Product Development
- Working effectively with rural communities
- Previous writing and conceptual development
- Working with committees comprised of both private and public representatives
- Projects of similar scope
- A deep connection and understanding of L. M. Montgomery and her life, contributions throughout the province and inspiration.

The Proponent must be community minded and able to work in a collaborative fashion with the Committee.

5. Project Framework

Municipal staff and the Committee will provide the following resources:

- Literary tour research comprised of best examples from around the world and interviews with local L.M Montgomery stakeholders, family members, operators and licensing authority.
- Draft Literary tour criteria (See Appendix A)
- Full report detailing the planned design for the park.
- Selected concept for the L.M. Montgomery Statue.

Proponent to provide information and planning as necessary for the project including:

- Notification to the Municipality of any changes in the contract time;
- Regular attendance at Committee meetings;
- Project schedule and milestones.

6. Reporting and Deliverables

Electronic copies of all information (reports, concepts, writings, images; e.g., images, etc.) shall be provided to the Municipality electronically, each as a single PDF file that includes the report text and any images. Reports shall also be provided in Word format.

All material produced, and information collected by the Proponent shall become the property of the Municipality. All material shall be kept confidential by the Proponent unless authorized in writing by the Municipality.

Where included in the scope of work, cost estimates are required and are to exclude HST.

SECTION 3. SUBMISSION REQUIREMENTS

1. General

Proponent shall provide the name, address, telephone and facsimile numbers and email address of all members of the project team involved in the project.

2. Resume

A resume including relevant experience with projects of this scope as well as qualifications that may have been acquired from the past 5 years.

3. References

Proponents shall provide 3 references for projects of a similar scale and value that the Proponent was directly involved in which is considered identical or similar to the requirements of this Request for Proposal. Failure to do so may cause for rejection of proposal. The list should include the following information:

- I. Client Name and address
- ii. Project Manager and telephone number
- iii. A brief, written description of the finished work, including any particular challenges and their respective solutions.

4. Sample work

Examples of previous writing and/or conceptual development should be included, along with access to view the finished product (i.e. web address, images, content)

5. Technical proposal

Proponents must provide

- Provide a description of the approach to the project and vision for the tour,
- Demonstrate an understating of the breadth and scope required to complete the project,

- Demonstrate the ability to meet the project needs with the expertise of the staff involved, including a breakdown of responsibilities on the project.

6. Cost proposal

Detailed cost estimate for the proposed work, including all fees for outside development, including design, printing, writing, translation, web site and all costs associated with the completion of the project should be outlined.

Sealed Proposals, one (1) unbound and duly signed copy or one (1) in digital format on flash drive or sent by email are to be submitted and labelled L. M. Montgomery Literary Tour, Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico and delivered to 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0

SECTION 4. SELECTION CRITERIA

(Total 150 points. Minimum pass mark 75%)

1. Expertise or team

(30 points - 15 points for each listed criteria)

- Relevant experience with projects of this scope & references

(References are only to be for projects of a similar scale and value that the Proponent was directly involved in). (15 points).

- Samples of past work of this scale. (15 points).

2. Knowledge & familiarity

(20 points)

- Familiarity with author; knowledge of her history and heritage. (20 points).

3. Past experience with similar projects

(30 points- 15 points for each listed criteria)

- Conceptual projects completed with a demonstrated experience in a community mindedness approach. (15 points).
- Key professional personnel on the project have extensive (5 or more years) previous experience in the major elements of the project. (15 points).

4. Methodology

(45 points - broken out as indicated)

- Approach and methodology are clearly outlined. (10 points)
- Approach and methodology address all aspects of the work to be completed. (20 points)
- Proposal demonstrates clear understanding of the scope and peripheral problems; all aspects of the work are addressed. (20 points)
- Proposed communications approach with the project team. (5 points)

5. Efficiency

(15 points)

- Demonstrated ability to work within identified timeframes. (15 points).

6. Cost

(10 points)

Detailed Budget for the project excluding taxes. (10 points).

The process for selecting the final Proponent/team for the project will be the responsibility of the Committee with a recommendation to Council of the Resort Municipality for a final decision.

SECTION 5. TERMINATION

Termination for Convenience: The Committee may terminate a contract, in whole or in part, whenever the Committee determines that such a termination is in the best interest of the Committee, without showing cause, upon giving written notice to the Proponent. The Committee shall pay all reasonable costs incurred by the Proponent up to the date of termination. However, in no event shall the Proponent be paid an amount which exceeds the bid price for the work performed. The Proponent shall not be reimbursed for any profits which may have been anticipated but which have not been earned up to the date of termination.

Termination for Default: When the Proponent has not performed or has unsatisfactorily performed the contract, the Committee may terminate the contract for default. Upon termination for default, payment will be withheld at the discretion of the Committee. Failure on the part of the Proponent to fulfill the contractual obligations shall be considered just cause for termination of the contract. The Proponent will be paid for work satisfactorily performed prior to termination, less any excess costs incurred by the Committee in re- procuring and completing the work.

SECTION 6. AWARD OF PROPOSALS

The Committee reserves the right to modify the terms of the Request for Proposal at any time at its sole discretion.

This Request for Proposal should not be construed as a contract to purchase goods or services. The Committee is not bound to accept the lowest price or any proposal of those submitted. Proposal will be assessed in light of the evaluation criteria.

Subsequent to the submissions of proposals, interviews may be conducted with some of the Proponents, but there will be no obligation to receive further information, whether written or oral from any Proponent.

The Committee will not be obligated in any manner to any Proponent whatsoever until a written contract has been duly executed relating to an approved proposal.

Neither acceptance of a proposal nor execution of a contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

SECTION 7. INTERPRETATION

The contract resulting from this Request for Proposal shall be construed under the laws of the Province of Prince Edward Island.

SECTION 8. INTEGRATION

This Request for Proposal document, the Proponent's response to this solicitation, and subsequent purchase order(s) to the successful proposal contain the entire understanding between parties, and any additions or modifications hereto may only be made in writing executed by both parties.

SECTION 9. NON-ASSIGNMENT OF CONTRACT

The Proponent shall not assign the contract, or any portion thereof, except upon the written approval of the Committee.

SECTION 10. INTELLECTUAL PROPERTY RIGHTS

The Resort Municipality and the Heirs of L.M. Montgomery where necessary, will be the owner of the intellectual property rights, including patent, copyright, trademark, industrial design and trade secrets in any deliverable product or product developed through this contract. Licensing and marketing rights to the developed product will not be granted in the contract. Proposals regarding these rights should not be submitted in response to this Request for Proposal and will not be considered in evaluating responses.

DRAFT COPY

Literary Tour Criteria for Authentic and Historic Sites and Activities (Option A)

Site name: _____

Willingness to Commit

Property owners will be ambassadors for all that is Montgomery. They must be willing to sign a Memorandum of Understanding that identifies quality standards they will meet and participate in activities designated to keeping the tour alive. This means that they are expected to contribute their ideas and attend meetings of tour participants.

Sites must meet all conditions in this section. Site should identify one main contact for the property who will be participating and has authority to make decisions.

Main contact: _____

____ 1-Site will sign memorandum of agreement outlining the conditions of participation.

____ 2-Site operator must attend up to two meetings a year relating to the establishment and promotion of the literary tour.

____ 3-Site has a web site and web site contains current information, hours of operation, admission costs, links to social media and to other literary tour participants.

____ 4-Site operator will attend training sessions on social media and will partner and participate with tour committee activities as they arise.

____ 5-Site operator will maintain at least one current and active social media account. It is expected that the primary tools to start will be Facebook and Instagram.

____ 6-Sites should aspire to maintain a four out of five-star rating on various reviewing sites (TripAdvisor, Google, etc.). Sites are expected to address any concerns promptly and to respond to them on appropriate platforms.

____ 7-Site will post literary tour signage or identifier as agreed to by the Tour Committee.

____ 8- Site will be expected to contribute financially to cover maintenance of tour assets (web site, signs, etc.) as decided by tour participants.

Authentic and Historic

There are multiple aspects for inclusion in the literary tour:

- Verified sites important to Lucy Maud Montgomery as part of her life
- Verified sites correlated to places in her literature.
- Sites housing multiple authentic artifacts that are verified and linked to her life or writings.

Sites must meet at least one of the conditions in this section.

9- Site was significant in her life. She either lived there or had a significant life event happen there or spent a lot of time there.

10-Site contains numerous artifacts belonging to Montgomery.

11- Site is significant in her writings. It is noted in her diaries or in her works.

Operational Availability

It was important that properties be accessible to visitors, not exclusively that the inside of the property could always be accessed, but that the property or vista was not located on private property where the owner had not granted access.

12-Site is open to the public a minimum of 6 days a week from early June to late September.

13-Site is open to all ages, does not discriminate and provides at least partial access for people with disabilities.

Literary Tour Criteria for Inspired or Adapted Sites and Activities (Option B)

Site name: _____

Willingness to Commit

Property owners will be ambassadors for all that is Montgomery. They must be willing to sign a Memorandum of Understanding that identifies quality standards they will meet and participate in activities designated to keeping the tour alive. This means that they are expected to contribute their ideas and attend meetings of tour participants.

Sites must meet all conditions in this section. Site should identify one main contact for the property who will be participating and has authority to make decisions.

Main contact: _____

_____1-Site will sign memorandum of agreement outlining the conditions of participation.

_____2-Site operator must attend up to two meetings a year relating to the establishment and promotion of the literary tour.

_____3-Site has a web site and web site contains current information, hours of operation, admission costs, links to social media and to other literary tour participants.

_____4-Site operator will attend training sessions on social media and will partner and participate with tour committee activities as they arise.

_____5-Site operator will maintain at least one current and active social media account. It is expected that the primary tools to start will be Facebook and Instagram.

_____6-Sites should aspire to maintain a four out of five-star rating on various reviewing sites (TripAdvisor, Google, etc.). Sites are expected to address any concerns promptly and to respond to them on appropriate platforms.

_____7-Site will post literary tour signage or identifier as agreed to by the Tour Committee.

_____8- Site will be expected to contribute financially to cover maintenance of tour assets (web site, signs, etc.) as decided by tour participants.

Enrichment, Learning or Cultural Component

9. Site provides a culturally respectful adaptation of Montgomery's works.

10- Site contributes significantly to the understanding of the author and her life.

11-Site contributes significantly to the understanding of her works.

12-Site provides a rich cultural experience through artistic and cultural media.

13-Site presents Montgomery and her characters in a realistic light.

Operational Availability

It was important that properties be accessible to visitors, not exclusively that the inside of the property could always be accessed, but that the property or vista was not located on private property where the owner had not granted access.

14-Site is open to the public a minimum of 6 days a week from early June to late September.

15-Site is open to all ages, does not discriminate and provides at least partial access for people with

disabilities.

Criteria for natural sites to be determined.