

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

Stanley Bridge • Hope River • Bayview • Cavendish • North Rustico



April 23, 2019

Request for Proposals

L.M. Montgomery Community of Interest Project Management

Client

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico is the only resort municipality on Prince Edward Island. This generally refers to an area where tourism or vacationing is the primary component of the local culture and economy. Tourism is the main export in our economy and is complemented by vibrant agricultural and summer residential communities. The Resort Municipality will act as the contracting agent for this project and will work closely with Tourism Cavendish Beach, who will manage the project and act as the champion for the new COI (Communities of Interest) development.

Tourism Cavendish Beach Inc (TCB) has been an incorporated regional tourism association for approximately 15 years. The Association is a membership-based, not-for-profit organization and has over 130 members scattered throughout the Green Gables Shore Region. The Association's mandate is to develop and promote tourism products consistent with its brand strategy in order to increase and expand visitation to the Green Gables Shore Region. TCB's brand strategy has been positioned as PEI's premiere beach region and favorite vacation gathering spot for families and friends. It includes following four pillars: Family Fun, Coastal, Recreation and Culture. L.M. Montgomery and her most famous heroine, Anne Shirley, are viewed as vital to the long term success of this region. Our brand promise is to help visitors connect and reconnect in many different ways.

BACKGROUND

We are excited for the development of this new Communities of Interest (COI) project which aims to focus attention on L.M. Montgomery, author of *Anne of Green Gables* and many other popular books who was resident of Cavendish for more than half her life. Oftentimes overshadowed by the lively and memorable character of her first novel, Anne Shirley, Montgomery lead a fascinating life and found much of her inspiration for her prolific writing in the landscapes, nature, community, and people of Prince Edward Island.

The COI will leverage the newly-developed literary tour that follows the life and work of Montgomery and includes many of her places of inspiration. All but one of the 20 books published in her lifetime are set principally on Prince Edward Island and, in addition, her own personal journals detail much about the people, places, and events of her time. Despite the fact that *Anne of Green Gables* was written more than 100 years ago, Montgomery's impact on the literary world and beyond remains impressive. New adaptations of her works continue to capture the hearts and minds of people from around the world and each year, hundreds of thousands of people - directly or indirectly influenced by her writing and stories - come to Prince Edward Island to find the places she described and to see for themselves the inspirational beauty of the Island.

Historically, most projects and initiatives connected to Montgomery on Prince Edward Island have focused the majority of attention on the fictional Anne Shirley. While the character's popularity is undeniable, a focus on Montgomery actually allows for a much broader range of appeal. Potential audiences include, but are not limited to: readers of all ages of Montgomery's books in any of the countries where those stories are read; readers and writers of fiction for youth; fans of any of the many adaptations of Montgomery's works globally; fans, researchers and writers of Canadian Literature or Children's Literature; women's groups; cultural history enthusiasts; PEI history buffs; Victorian culture enthusiasts; etc. It should be noted that this does not mean that *Anne of Green Gables* (Montgomery's most popular book) should not be considered in the development of this COI, but that it should not be considered the *primary* area of focus.

The project will use ACOA's Communities of Interest approach to increase awareness, engagement, and ultimately visitation of Montgomery's Prince Edward Island. A "community of interest" is a group of people with a shared passion, experience, or interest connected through social media. Through a combination of local advocate and external influencer marketing, this approach aims to reach a much larger and more engaged audience than has typically been reached with traditional marketing channels. This approach uses a shared interest – in this case, Montgomery - as a method of identifying and targeting a specific audience using advocates and influencers who aim to inspire the community members with their own experiences.

As the champion for this COI, Tourism Cavendish Beach will be responsible for leading this project, although other partners in the region with products or experiences that fit within the theme of this COI will be engaged. Some of these partners include: Tourism PEI, Central Coastal Tourism Partnership, and Parks Canada.

ASSIGNMENT

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico is seeking a qualified consultant to develop and implement an integrated advocate and influencer marketing strategy to reach, engage with and ultimately entice Montgomery enthusiasts to experience the inspiring world of Montgomery in 2019 and beyond. The consultant will follow the four-phase COI model developed by ACOA: discovery, mobilization, motivation and action.

The intent is to launch the project in July 2019 with an expected end date of December 2020. There is potential to extend certain social media marketing elements past the completion of this project. Any extension of these elements will be awarded through a separate RFP.

PROJECT SCOPE

Immediately following the awarding of this contract, the consultant will meet with the client and representatives from ACOA (including Tourism Atlantic) to review the scope and objective of this assignment. The consultant will also be required to present a plan for the COI approach to stakeholders and funders, including ACOA.

In developing and implementing a COI approach for The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico targeting Montgomery, the consultant(s) will deliver on the following aspects of the COI project:

1. Discovery and Identification

- Research and create target audience profiles with considerations for demographics, values and motivations
- Conduct target audience research to determine a strategy for executing the COI which may include Google Analytics, Social Media Analytics, Online Research, Provincial or Regional Tourism Research or Environics Analytics
- Develop an inventory of products and experiences in the region that will compliment this COI and potentially engage its target audience

2. Mobilization

- Identify local advocates who reflect the values and goals of the COI, have strong social media engagement and are willing to participate in this type of initiative
- Arrange a discovery meeting for local advocates to connect in person to share project objectives, establish a network and secure their commitment
- Determine potential training requirements for local advocates which may include photography, promoting links, running giveaways, writing for social or hashtag use
- Determine incentives for local advocates, which may include training, tickets to events, giveaways for their followers, access to social media influences, branded clothing, etc.
- Secure agreements with local advocates
- Organize the local advocates into a network on a common platform and maintain regular communication with the group through this channel (i.e. private Facebook group)
- Identify a list of potential external influencers with input from the local advocates
- Determine or develop key events related to Montgomery to host influencers and connect them with advocates
- Invite social media influencers to the region
- Secure agreements with influencers
- Foster and develop relationships with social media influencers including facilitating connections with the local advocates

3. Motivation

- Create a content strategy for the COI which should include:
 - o Channel strategy and development needs
 - o KPIs and associated metrics
 - o Necessary tracking tools
 - o Hashtags
 - o A content calendar including key events
 - o Opportunities for promoting stakeholder links, discount codes, giveaways
 - o Voice and visual identity for the COI
 - o Asset development (i.e. landing pages, video, additional social platforms)
 - o Programmatic marketing including management and implementation strategies
- Organize training opportunities for local advocates based on their stated needs and the content strategy for the COI which could include experiential product development

4. Action

- Launch the project, potentially around a key event
- Monitor, budget, oversee content and report on KPIs
- Provide feedback to local advocates and address questions as they arise
- Compile a final report upon completion of the COI including KPIs, local advocate experience, influencer experience and stakeholder considerations, lessons learned, etc.

While the successful Project Manager will have flexibility in how they choose to mobilize and connect with local advocates, influencers and stakeholders, a monthly meeting will be required with the COI project team to report on progress.

GUIDELINES FOR PROPOSAL SUBMISSION

Submitted proposals must demonstrate a strong understanding of the community in terms of its tourism economy, assets and unique visitation drivers. Applicants must also demonstrate an understanding of the COI concept and experience working with advocate and/or influencer marketing. Proposals should also demonstrate methods for engaging multiple stakeholders and opportunities to provide regular feedback to the client and project funders.

Responses are suggested to include the following sections:

- **Executive Summary** - A high-level synopsis of the applicant's response to the RFP. This should identify the main features and benefits of the proposed approach.

- **Scope, Approach and Methodology** - This section should include a brief description of the proposed scope, approach and methodology that will be used to meet the required deliverables.
- **Project Management Approach** - This section should be used to identify any areas of the project that may be outsourced to a third party and the skills that third party will need to be successful. Briefly include the engagement process with Tourism Cavendish Beach from beginning to end as well as engagement processes for local advocates and influencers.
- **Detailed Budget** - The proposed total for this project is \$39,500 +HST. Costing proposals must contain all costs and expenses specific to the allocation of professional time and tools required to deliver the project.

Please note, separate budget will be provided for:

- Programmatic marketing spend
 - Asset development
 - Training and incentives for advocates
 - Influencer engagement
 - Events (i.e. launch or amplifying current events)
 - Experiential product development training
- **Appendix: References** - Provide three current corporate references for whom similar work has been performed.
 - **Appendix: Project Team Staffing** - Include brief biographies and relevant experience of the staff that would be assigned to this project.
 - **Appendix: Company Overview** - Please provide official company name, contact information and the name of the person authorized to contractually bind the organization for any proposal against this RFP.

Notification of Results

The Resort Municipality will notify the successful proponent of the award in writing, via email and over the telephone as soon as a decision has been reached. All other proponents will be advised, in writing, via email of the Municipality's decision within one week of the selection of a successful proponent.

Right of Cancellation and Rejection

The final authority to award this project rests with the Council of the Resort Municipality. The Resort Municipality reserves the right to cancel this RFP at any time prior to entering into a contract with the successful proponent. The Resort Municipality reserves the right to reject any or all proposals, whether or not they contain all required information, without stating reasons.

Proponents should note that the lowest cost proposal will not necessarily be awarded a contract.

Modification of Terms

The Resort Municipality reserves the right to amend or supplement this RFP at any time at its sole discretion before the closing date, by issuing an addendum. The Resort Municipality may amend the closing date if an addendum is issued five business days before the closing date, to allow for consideration of the addendum by potential proponents. The Resort Municipality may request clarification of any proposal and may waive formalities where, in the opinion of the Resort Municipality, there is a minor irregularity or omission in the information submitted by a proponent. The final Terms of Reference that govern the contract between the Resort Municipality and the successful proponent are subject to adjustment by the Resort Municipality and the successful proponent.

Proponent Expenses

Proponents are solely responsible for any and all expenses incurred in the preparation of proposals and subsequent negotiations with the Resort Municipality. The Resort Municipality will not be responsible for any liabilities, costs, expenses, loss or damage associated with or arising from the proposal preparation, interview and selection process and incurred by potential proponents.

Conditional Proposals

Conditional proposals will not be accepted.

Indemnity

No proponent has legal rights or privileges for services rendered before a contract is signed with the Resort Municipality. Any contract resulting from this RFP is subject to the indemnity provisions in that contract.

Conflict of Interest

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.

Sub-contracting

While the proponent may engage sub-contractors for this project, the Resort Municipality will deal directly with the lead proponent identified in the cover letter to the technical proposal. The lead proponent will assume all responsibility and liability for the acts and omissions of the team. The lead proponent must have the authority to bind the members of the team to the contract negotiated with the Resort Municipality. Additional or replacement sub-contractors will not be permitted without the prior written consent of the Resort Municipality.

Compliance with Laws

Any contract resulting from this RFP will be governed by, and will be construed and interpreted in accordance with, the laws of the Province of Prince Edward Island.

The proponent is responsible for obtaining all necessary licenses and permits, and for complying with all applicable federal, provincial and municipal laws, codes and regulations in connection with submitting a proposal and providing contracted services. The proponent shall, when requested, provide the Resort Municipality with adequate evidence of its compliance with this section.

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)

Period of Submission Validity

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

CONTACT INFORMATION

Any questions concerning this RFP can be submitted before May 3, 2019 to:

Name	Brenda MacDonald
Address	7591 Cawnpore Lane, Cavendish, PEI COA 1N0
Phone	902-963-2698
Email	resortmunicipal@eastlink.ca

SUBMISSION DETAILS

Four copies of the proponent's proposal along with a digital copy on a flash drive should be included in a sealed package, prominently marked with the completed submission label and delivered to the address below:

Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0.

Proposals submitted by facsimile transfer or e-mail will not be accepted.

Proposals are due by 12 noon (Atlantic Standard Time) on May 14, 2019. Proposals received after the closing time will not be considered. Proposals must be submitted at the location set out on or before the closing time and date. The proponent is solely responsible for the delivery of its proposal to the exact location indicated in this RFP on or before the closing date and time. The Resort Municipality does not accept any responsibility for proposals delivered to any other location by the proponent or its delivery agents. Proposals submitted after the closing date and time will be rejected. The Resort Municipality's time clock will be deemed to be correct.

Submission Label

Proponents should label their submissions as follows:

Attention: Brenda MacDonald, CAO

Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0

RFP Title: L.M. Montgomery Community of Interest Project Management

Full Legal Name of Proponent:

Return Address of Proponent:

TIMELINE

Event	Date
1. RFP Distribution to Vendors	April 23, 2019
2. Proposal Due Date	May 14, 2019
3. Anticipated decision and selection of Vendor	May 28, 2019
4. Anticipated launch of COI	June 1, 2019
5. Submission of Project Report	December 20, 2020