

Request for Proposal (RFP) for Strategic Plan 2025-28

Issued by: Travel Drumheller

Date Issued: August 20, 2024

Submission Deadline: September 10, 2024 at 4:00PM MDT

**- SUBMIT PROPOSAL VIA EMAIL-
EMAIL TO executivedirector@traveldrumheller.com
with the Subject Line
RFP: TD Strategic Plan 2025-28**

1. Request for Proposal – The following table represents Travel Drumheller’s anticipated schedule for this Request for Proposal. This schedule is subject to change at Travel Drumheller’s discretion:

Activity	Date	Time (MDT)
Issuance of RFP	August 20, 2024	10:00 hrs
Close of Questions Deadline	September 3, 2024	12:00 hrs
RFP Closing Date	September 10, 2024	16:00 hrs
Interviews	September 19, 2024	09:00 to 17:00 hrs
Notification of Results	September 23, 2024	10:00 hrs

2. Questions or Inquiries – Questions or inquiries regarding this Request for Proposal will be considered if received not later than the date and time provided in the Request for Proposal (“Close of Questions Deadline”). Questions may be submitted via email and must be directed to the contact person listed below

Julia Fielding Executive Director
executivedirector@traveldrumheller.com
 Phone: (403) 823 2242

Travel Drumheller, its agents, and employees shall not be held responsible for any information given by way of verbal/oral communication.

3. Closing Date - Proposals must be received via email no later than the date and time provided in the Request for Proposal Schedule (“RFP Closing Date”).

Any submissions received after this date and time will be considered disqualified.

Proposals must be submitted via email and received in the Executive Director’s executivedirector@traveldrumheller.com email inbox by the date and time stated in the Proposal Schedule and have the email subject line **“RFP: TD Strategic Plan 2025-28”**

INVITATION TO SUBMIT

1. Project Overview

Travel Drumheller invites qualified consultants to submit proposals to provide professional services to create a new three-year strategic plan. This plan will identify the goals of the organization over the next three years, provide a directional framework (including KPIs) to meet these goals, be inspirational for the community and the whole team, inform the values of the organization, align with the Destination Development Plan and ensure there is alignment between the board and staff.

1.1 The Organization

Travel Drumheller is the Destination Marketing and Management Organization for the Drumheller region. They are a not-for-profit organization managed by the Executive Director who reports to a voluntary Board of Directors. Currently, the organization includes three full-time, one part-time, and five contract staff. Travel Drumheller is funded by a voluntary Destination Marketing Fund collected by accommodation providers in Drumheller, grants from Travel Alberta, the Government of Alberta, and the Town of Drumheller along with partnership dues.

Travel Drumheller was created in 2013 but struggled to succeed due to funding and staffing issues. In 2020 a pilot project seconded a full-time staff member from the Town of Drumheller into the Executive Director role. The pilot was extremely successful, and the Executive Director became a permanent employee of Travel Drumheller in January 2023. This success has led to significant funding increases translating into increased capacity for marketing, building community pride, and business support. Travel Drumheller has also taken on responsibility for implementing the Destination Development Plan launched in 2023.

Travel Drumheller composed a three-year strategic plan in 2021 and is now looking to develop a new plan to reflect the changes in the organization and tourism industry. Travel Drumheller has progressed into a more destination management and stewardship role and has a much higher profile in the community. It is vital to build staff and board alignment, determine a clear direction, and identify resources for the team so it can be successful in its work making the Drumheller region an iconic year-round destination.

1.2 The Region

The region: recognized as the **“Dinosaur Capital of the World”**, is rich in geological and paleontological history. The breathtaking landscapes are unique in Canada. Drumheller region is a developing tourism cluster with major attractions, activities, events, and visitor experiences. Although the region attracts about a million visitors each year, visitation is primarily in the summer and remains focused on a few major attractions, including the Royal Tyrrell Museum. There is huge potential to build on these strengths and create a year-round global tourism destination.

Travel Alberta has identified Drumheller as a key region to become an export-ready destination attracting higher-value visitors, particularly international visitors with higher spending power.

Travel Drumheller recently completed a Destination Development Plan (DDP) for the region with a vision **“to be an iconic year-round destination grounded in community”** and a mission of **‘Driving significant economic and social value for Drumheller residents, businesses, and visitors through destination development.’** The DDP defined the region based on visitor experience and includes the Town of Drumheller, portions of Kneehill, Starland, Wheatland Counties, and Special Areas.



Scope of Work

The project objective is to develop a comprehensive three-year Strategic Plan for the organization Travel Drumheller in its role as the Destination Marketing and Management Organization for the region. It is intended that the plan will support the organization as it drives the Drumheller region forward. The strategic plan should be in alignment with the Destination Development Plan but is not to take its place. This is the strategic plan for the organization rather than the destination. Travel Drumheller is looking at its role as an ally and promoter of Diversity, Equity, and Inclusion and this must be reflected in the Strategic Plan.

It is expected the following will be provided to Travel Drumheller:

- Review of the last strategic plan, and achievements and missteps of the organization
- A short environmental scan of tourism industry priorities in Alberta, Canada, and around the world
- Engagement with partners, staff, board members, and partner organizations
- The results of engagement sessions with Travel Drumheller partner businesses, partner organizations such as local municipalities, Travel Alberta, staff and board members, and possibly residents
- Priorities for the next three years
- Diversity Equity and Inclusion priorities
- A series of action items with associated Key Performance Indicators
- Possibly organizational values (To be determined in discussion with the successful contractors.)

2. Deliverables

The expected outcomes of this project include, at minimum the following:

a) Monthly Update Reports

b) Partner and Stakeholder Engagement and Consultation

c) Staff and Board Engagement and Consultation

d) A Draft Strategic Plan

This will be presented to the Travel Drumheller board and staff for approval

e) The final Strategic Plan

Examples of items in the final document include, but are not limited to, Include:

- Strategic Context
- Mission & Vision
- Strategy Statement
- Board & Governance
- Diversity, Equity and Inclusion
- Guiding Principles
- Values
- Strategic Priorities
- KPI Strategic Framework

f) Design a presentation of the Final Strategic Plan Outlining for example

- Process
- Strategic Vision
- Strategic Priorities
- KPIs

g) Consolidated Project Materials in digital format

This will contain all background information, research, and original user group, community, and stakeholder input alongside the final deliverables.

3. Stakeholder Participation & Public Consultation

An important outcome of the Strategic Plan is that it reflects what was heard by partners, and the Travel Drumheller team. It is intended that engagement tools be utilized to engage the wider tourism business community and residents and gather information from partner organizations, government stakeholder groups, municipal staff, and Councils. Findings from this work should be reviewed and used to inform the strategic direction for Travel Drumheller. Appropriate tools include (but are not limited to) online surveys, group discussions, and phone interviews. It is expected that group discussions will be held with the board of directors, and the staff individually and then as a joint group.

Organizations to be engaged include (but are not limited to):

- Drumheller and region tourism business owners
- Municipal Councils and administration across the region
- Travel Drumheller paying partners
- Regional partner organizations
- Residents
- Travel Alberta
- Tourism Industry Association of Alberta
- Indigenous Groups
- Siksika First Nation

4. Information to be provided

- [Drumheller Destination Development Plan](#), Destination Drumheller.
- Travel Drumheller Strategic Plan 2021-24
- Travel Drumheller brand guidelines

5. Proposed Schedule

Activity	Date
Project Initiation	October 1st, 2024
Project Completion	March 31, 2025

All work associated with this contract must be completed, with the final products submitted no later than April 1st, 2025.

Monthly progress reports will be submitted to the RFP-designated contact. It should be understood that the RFP gives a general outline of the reporting and meeting requirements and that the RFP-designated contact will work with the proponent to establish expectations around the format, progress, direction, and frequency of communication.

Startup and Report Meetings as a part of the project, will be held in the Drumheller region if possible. Meetings for status on a higher frequency may take place online.

Below is a minimum suggested level of communication with respect to reporting during the project:

- Startup Meeting
- Bi-weekly Status meetings
- Draft Plan – Presentation to Travel Drumheller staff and Board

6. Proposed Budget

The maximum budget for the project is \$40,000, before GST. Billing should indicate personnel, number of hours, hourly rates and expenses. All payments will be predicated on acceptance of interim, and/or final products. At no time shall the contract fee be exceeded.

PROPOSAL MANDATORY REQUIREMENTS

1. Proposal Mandatory Requirements

Proposals must comply with the following requirements in order to be considered by Travel Drumheller:

1.1 The Proponent must be able to list Travel Drumheller as an additional insured. The successful Proponent must be able to provide proof of the following insurance requirements:

a. General Liability Insurance in an amount not less than Five Million Dollars (\$5,000,000) per occurrence for personal injury and/or property damage. b. Automobile Liability Coverage in an amount not less than Two Million Dollars (\$2,000,000) per accident for bodily injury and/or property damage. c. Professional Liability Insurance covering the services provided by the Consultant with policy limits not less than Five Hundred Thousand Dollars (\$500,000) per claim.

The Proponent should submit confirmation of full compliance with all the requirements with their proposal.

2. Proposal Format Requirements

Proposal page limit shall not exceed 10 pages (with up to an additional 10 pages for staff resumes). Proposals' content should be organized in the following format to ensure proper evaluation:

- Cover Page (First page of this RFP)
- Executive Summary
- Confirmation of Compliance with Mandatory Requirements
- Corporate Qualifications & Experience
- Key Staff & Qualifications
- Methodology
- Engagement Ideas
- Project Schedule
- Financial (to include billing schedule)

3. Proposal Criteria

The following provides a description for each of the previously mentioned criteria:

3.1 Cover Page – The cover page is the first page of this RFP document and should be completed in full and attached as the first page of the Proposal. It must be signed by an authorized representative of the Proponent.

3.2 Executive Summary – The executive summary should present highlights of the Proponents Proposal and should be no more than one (1) page.

3.3 Confirmation of Compliance with Mandatory Requirements – Proponents are required to provide confirmation and evidence that they meet all the Mandatory Requirements as outlined in Section 1 of the Proposal Submission Requirements.

3.4 Corporate Qualifications and Experience – Proponents are to explain why they are the best choice to provide the services as described in the Request for Proposal. Key strengths should be clearly identified.

Provide summary and related references for at least three projects completed within the last five years, for which the Proponent has provided prime consultant services. These reference projects must:

- Be similar in nature to the project for which the Proposals are being sought; and
- Have a required scope of services similar in nature to this project.

3.5 Key Staff and Qualifications – Proponents shall include, with their sub-consultants (if applicable), a list of key staff involved in the project.

The Proposal should clearly identify the roles each key staff will be responsible for in the implementation of the anticipated contract.

A resume shall be provided for each staff member that includes qualifications, education, experience, capability, and current workloads. The location of the offices of the key team members shall be identified. Each employee's contribution to this project shall be identified as a percentage of the project. In addition, the percentage this project would represent of the individual employee's entire workload shall be provided.

For example:

Employee	Project Contribution	Workload
Employee A	60%	80%
Employee B	30%	50%
Employee C	10%	5%

3.6 Methodology – Proponents are to provide a clear understanding of the project's objectives. The proponent should include a clear explanation of their proposed approach. The Proponent shall also include any innovative comments and ideas pertaining to the project that may not have been addressed in the Request for Proposal as they see fit.

3.7 Project Schedule: Proponents are to provide a Project Schedule and site visit schedule for the project's duration. An overall flowchart detailing the ultimate time guideline from initiation to completion of the project phase is required. The absolute deadline for this project is **April 1st, 2025**. Proponents are required to provide their expected completion date for the project.

3.8 Financial – Proponents are to provide a cost breakdown detailing each task, estimated hours, hourly rate and disbursements. The budget is to include all expenses, such as travel costs as there are **no other funds for the project**. The financial evaluation will be calculated by taking the lowest proposal price divided by each other proponents' proposal price. The calculated point will then be multiplied by the weight indicated in the evaluation criteria and weighting table.

3.9 Additional Content – Proponents may at their discretion include additional information which they consider relevant to ensure a full and proper evaluation, provided that the specified maximum allowable number of pages is not exceeded.

4. Interview - The evaluation procedure may include a short list based on the stated evaluation criteria. The short-listed proponents may be asked to prepare a presentation or provide additional technical information or clarification prior to the final selection. Interviews (If presentation is to be provided) will be at the Travel Drumheller office or online, if necessary, and can be scheduled by contacting Julia Fielding at executivedirector@traveldrumheller.com or (403) 823-2242.

INSTRUCTIONS

1. Definitions

- 1.1 "Mandatory" means an essential requirement.
- 1.2 "Travel Drumheller" is synonymous for the purposes of this RFP. They mean a duly authorized representative on behalf of Travel Drumheller.
- 1.3 "Consultant" means the successful Proponent that enters into an agreement with Travel Drumheller.
- 1.4 "Proponent" means the person or firm responding to this RFP.
- 1.5 "Proposal" means the submission received from a Proponent in response to this RFP.
- 1.6 "Request for Proposal" or "RFP" means this entire document and any addenda thereto issued before the RFP closing time.
- 1.7 "The Work" refers to the activities related to the scope of this RFP.

2. Originals and Copies – Proposals can be submitted in writing to the address provided above (in the 'Invitation' section) with the exterior of the package clearly marked "TD Destination Development Plan" or via email to ad

3. Oral Representations – Proponents shall not rely upon any oral information provided by Travel Drumheller or its representatives.

4. RFP Clarifications/Addenda – Proponents shall carefully examine the Request for Proposal Documents and report any errors, omissions, discrepancies or clauses requiring clarification. When necessary, Travel Drumheller shall respond to questions and clarifications by way of Addenda to report any changes to the Request for Proposal Documents. Any Addenda issued prior to the closing date will form part of the Request for Proposal Documents.

5. Rejection of Proposals – Travel Drumheller shall not be obligated to accept Proposals that are unsigned, incomplete, conditional, illegal, or contain irregularities of any kind or if the Proponent fails to meet all the requirements stated in this Request. Travel Drumheller also reserves the right to disqualify any Proponent submission whose credentials or performance has been deemed unsatisfactory in the past.

6. Travel Drumheller's Discretion – Travel Drumheller reserves the right to accept, or reject any Proposal, and not necessarily the lowest cost Proposal.

7. Budget Funding – If the Proposal pricing submitted in the best-evaluated Proposal exceeds the amount Travel Drumheller has budgeted or estimated, Travel Drumheller may either reject all proposals, award the contract to the Proponent

who submitted the next best-evaluated Proposal with proposal pricing that is within Travel Drumheller’s budget, or attempt to negotiate a lower price with the Proponent who submitted the best-evaluated Proposal.

8. RFP Cancellation – Travel Drumheller reserves the right to cancel this Request for Proposal for any reason without any liability to any Proponent or to waive irregularities at their own discretion. No payment will be made by Travel Drumheller for costs incurred in the preparation or submission of this document.

9. Conflict of Interest – The Proponent shall have no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out any consulting services for Travel Drumheller. Should such an interest be acquired during the Proposal process, the Consultant shall immediately declare it to Travel Drumheller. Travel Drumheller will, immediately upon notification, take action as it deems appropriate. This may include rejection of the submitted Proposal.

10. Proposal Confidentiality – All documents submitted to Travel Drumheller will be subject to the protection and disclosure of the Alberta *Freedom of Information and Protection of Privacy Act (FOIP ACT)*.

11. Evaluation of Proposals – Proposals will be evaluated as follows:

11.1 Mandatory Requirement Screening – Proposals must meet the Mandatory Requirements outlined in Part 1 of the Proposal Submission Requirements Section. It will be at Travel Drumheller’s sole discretion to determine if a Proposal shall be disqualified due to insufficient or incomplete information.

11.2 Evaluation Criteria and Weighting – Proposals meeting the Mandatory Requirements will be evaluated in accordance with the following criteria and weighting:

Item	Evaluation Criteria	Weight
1	Quality of Proposal	10
2	Key Staff & Qualifications	10
3	Methodology	30
4	Project Schedule	20

5	Financial	15
6	Interview	15 (If no interviews held it will be scored out of 85)
TOTAL		100

11.2.1 Evaluation of Technical Requirements - The technical requirements of this Proposal are “Quality of Proposal,” “Key Staff & Qualifications,” and “Methodology.” The Proponent’s responses to these technical requirements will be evaluated using a rating scale of 0 to 5 as outlined below. The determined rate score will then be multiplied by the predetermined weight as specified in the chart above. Each weighted score will be added to arrive at a total score for the technical requirements. In the event of a tie score, the technical requirements score will be used as a tiebreaker. Travel Drumheller will assign scores at the sole discretion of the Evaluation Committee assigned to the project.

Rating		Explanation
5	Excellent	Exceeds Requirement/Adds Value
4	Above Average	Exceeds Minimum Requirements
3	Average	Meets Minimum Requirements
2	Below Average	Falls Short of Expectations. Lacking Innovation
1	Poor	Falls to Meet Minimum Requirements
0	Non Responsive	Did Not Attempt to Address Requirement

11.2.2 Quality of Proposal – Proposals will be evaluated on the overall package including presentation, completeness, and relevant information provided.

11.2.3 Key Staff & Qualifications – Proposals will be evaluated on the qualifications and availability of key staff. Staff members with experience related to Strategic Planning will be considered the most valuable.

11.2.4 Methodology– Proposals will be evaluated on their approach to completing the Strategic Plan. It is important that the Proposal demonstrates a clear understanding of the various components of this project and a comprehensive approach to the development of the methodology.

11.2.5 Financial – The financial evaluation will be calculated by taking the lowest Proposal Price divided by all other Proponents Proposal Price. The calculated point will then be multiplied by the weight indicated in the Evaluation Criteria and Weighting table above.

11.2.6 Project Schedule- this will be evaluated by looking at the proposed schedule and how it meets Travel Drumheller's deadline of April 1st 2025.

11.2.7 Interview – The interview will be evaluated based on the responses to questions asked by the Evaluation Committee relating to the project team, schedule, budget, and technical aspects.

12. Award – The Evaluation Committee assigned to the Request for Proposal will make an award to the Proponent that submitted the Proposal with the highest total score within the available budget amounts.

13. Proposal Feedback – All unsuccessful Proponents will be notified within three (3) business days after the contract award.

14. Communication – Proponents or bidders are required to ensure that no communication is made by the proponent/bidder or its representatives, including a third-party representative employed or retained by it, to promote or oppose any bid/proposal, make any public announcement, or communicate with any news media in any way unless such communication has first been approved by an appropriate Travel Drumheller Official. Failure to comply with this communications clause may affect the current awarded contract, as well as future contracts.

GENERAL TERMS

1. Reporting

1.1 The Consultant shall submit to Travel Drumheller regular progress reports with respect to the Services provided by the Consultant. If Travel Drumheller, acting reasonably, determines that additional progress reports are necessary, the Consultant shall submit all additional progress reports requested at no additional cost to Travel Drumheller.

1.2 The Consultant shall meet with Travel Drumheller's RFP designated contact and any other Travel Drumheller staff as appropriate to discuss the project's progress, to review interim results, and to receive direction as required. If Travel Drumheller, acting reasonably, deems additional meeting necessary, the Consultant shall attend those meetings.

2. Termination of Agreement

2.1 Travel Drumheller may terminate this Agreement immediately by giving the Consultant written notice if the Consultant:

- a) in the opinion of Travel Drumheller, fails to complete the Services or any portion thereof within the time stated in this Agreement for such completion, or
- b) becomes insolvent or commits an act of bankruptcy or
- c) abandons the project or
- d) assigns this Agreement without the required written consent or
- e) fails to observe or perform any of the provisions of this Agreement or f) has any conflict of interest, which may, in the opinion of Travel Drumheller, have an adverse effect on the Project.

3. Indemnity

3.1 The Consultant agrees to indemnify, protect, and save harmless Travel Drumheller, its officers, agents, and employees from and against any and all losses, claims, demands, payments, suits, judgments, charges, expenses, actions, causes of action and costs arising out of the willful misconduct of the Consultant including, but not limited to, trespass or nuisance and the negligent performance of the Consultant's services.

4. Insurance

4.1 During the term of this agreement, the Consultant must carry the following:

- a) Commercial General Liability including bodily injury, death, and property damage, in an amount of \$5,000,000 (combined single limit on each occurrence) Such coverage is to include blanket contractual liability, contingent employer's liability, cross liability, contractors' protective liability, non-owned automobile, attached equipment, broad form property damage, products and completed operations and sudden and accidental pollution. Travel Drumheller is to be added as an additional insured to the coverage.
- b) Automobile Liability Insurance for owned, leased, hired, operated, or licensed vehicles with limits of \$2,000,000 for accidental injury to or death of one or more persons or damage to or destruction of property as a result of one accident or occurrence.

c) Professional Liability Insurance covering the services provided by the Consultant with policy limits not less than one million dollars (\$1,000,000) per claim.

4.2 The Consultant shall be responsible for the payments of all premium and deductible amounts relating to the insurance policies, and the Consultant shall maintain the insurance from the date of this agreement until the completion of the project.

4.3 Each such policy shall state that it cannot be canceled without at least 30 days written notice to Travel Drumheller.

5. Payment & Completion

5.1 Travel Drumheller shall make regular payments based on the Consultant submitting Progress Reports. Payment will be calculated on the basis of actual work completed as measured in monthly invoices and reports showing a narrative describing work performed during the billing period, progress by major tasks, costs incurred, person-hours expended, and a task completion report.

5.2 Such payments shall be due and payable to the Consultant within thirty (30) days from the monthly report submission date.