



# REQUEST FOR PROPOSALS

DATE ISSUED: January 29, 2020

NOTICE OF INTENT TO BID: February 10, 2020

PROPOSERS' Questions: February 24, 2020

RFP CLOSING DATE/TIME: March 23, 2020

FINALIST PROPONENT INTERVIEWS: March 30, 2020

CONTACT PERSON: Paul Morralee, Managing Director  
[Canadian.lighthouses@gmail.com](mailto:Canadian.lighthouses@gmail.com)

## PROPOSER INFORMATION

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BUSINESS NAME

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MAILING ADDRESS

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CITY

POSTAL CODE

( )

( )

TELEPHONE

FAX

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CELLULAR

EMAIL ADDRESS

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SIGNATURE

NAME AND TITLE OF AUTHORIZED PERSON

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DATE

HST REGISTRATION NUMBER

**Special Note:** A signed copy of this form must be emailed or delivered to Canadian Lighthouses of Lake Superior Inc. at the address below by no later than 4:30pm on **March 23, 2020**



# REQUEST FOR PROPOSALS

## A. Project Overview

Although the project will be described in detail later in Section D of this RFP, a brief description of the project is as follows:

Canadian Lighthouses of Lake Superior Inc. (CLLS) in partnership with the Lake Superior National Marine Conservation Area (NMCA) and the Thunder Bay Community Economic Development Tourism Investment Committee (CEDC) is seeking a consultant(s) to approach CLLS members, friends, stakeholders, guests and funding agencies through phone and email surveys and focus groups, to collect data, visit lighthouse trail sites and compile an in depth 5 year sustainability plan based on the feedback from the industry within a general framework as presented below:

- 1) Governance and operations of CLLS
- 2) Visitor experience product development and heritage conservation
- 3) Infrastructure development / maintenance
- 4) Revenue generation and fiscal sustainability
- 5) Fundraising, promotion and communication
- 6) Develop a specific plan for Thunder Bay Main Lighthouse

The proposed budget range for this project is between \$24,000 – \$30,000.

CLLS expects Proponents to:

- provide a comprehensive proposal that meets or exceeds all requirements of this RFP;
- demonstrate their experience in providing strategic plans to similar organizations; and
- assume responsibility for all requirements in this RFP.

CLLS expects a single Proponent to take responsibility for the completion of the plan. While teaming and subcontracting are permissible, one firm shall be the prime supplier on the contract.



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## B. Administrative Information

### 1. Definitions

This section defines the key terms used throughout the RFP document. Canadian Lighthouses of Lake Superior Inc. will hereinafter be referred to as “CLLS”.

The term “Proponent” is defined as “an individual or a company that submits or intends to submit a proposal in response to this Request for Proposal”.

The successful Proponent will be referred to as “the Consultant(s)”.

This Request for Proposal will hereinafter be referred to as an “RFP”.

The words “shall” or “will” are used to indicate a mandatory requirement.

The word “should” is used to indicate an optional requirement.

### Proponents’ Questions

Proponents are encouraged to email any questions regarding this RFP by emailing [canadian.lighthouses@gmail.com](mailto:canadian.lighthouses@gmail.com) no later than 4:30pm on March 23, 2020. This represents the only opportunity for Proponents to pose questions regarding the RFP, and project or any other relevant topic. CLLS will email each of Proponents a list of answers to all the questions asked by February 24, 2020 no later than 4:30pm. No payment will be made for participation in the questions asked.

### Closing Date, Time and Location

Each Proponent must deliver his/her proposal electronically. Proposals must be received no later than 4:30pm local time in Thunder Bay, Ontario on March 23, 2020 at: [canadian.lighthouses@gmail.com](mailto:canadian.lighthouses@gmail.com)

### Late Proposals

It is the responsibility of each Proponent to ensure that his/her proposal is received at the Closing Location by the Closing Time and the Proponent assumes the entire risk of failure of CLLS to receive its proposal at the Closing Location by the Closing Time. Proposals received at the Closing Location after the Closing Time will not be considered and may be returned to the Proponent.



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## Schedule and Timing of Project

It is expected that the project will begin during the week of April 20, 2020. The completion date is expected to be on or before September 20, 2020, although an extension may be granted if necessary.

## Summary of Key Activities, Dates and Times:

Activity	Date/Time
Notice of Intent to Bid	February 10, 2020
Proponents' Questions	February 24, 2020 – 4:30pm
Answers to Proponents' Questions	March 9, 2020
RFP Closing	March 23, 2020 – 4:30pm
Finalist Proponent Interviews	March 30, 2020
Proponent selection complete	April 9, 2020
Contract with Proponent	April 20, 2020

## Conflict of Interest

CLLS reserve the right to disqualify any submission due to a conflict of interest. Each applicant must disclose any actual or potential conflict that may be occurring at time of bid, or may occur during the course of the project. If a vendor fails to disclose an actual or potential conflict or where such a conflict cannot be resolved, CLLS have the right to terminate the contract.

## Evaluation and Selection

Evaluation of Proposals will be performed by a committee formed by CLLS. Proposals will first be checked against mandatory criteria. Proposals not meeting the mandatory criteria will be rejected without further consideration. Proposals that do meet the mandatory criteria will then be assessed against additional criteria. CLLS intent is to enter a Contract with the Proponent who has the highest overall ranking. Please refer to Section H for a list of criteria and their weighting.

## Negotiation Delay

If a Contract cannot be negotiated with the highest-ranking Proponent within a reasonable period of time satisfactory to CLLS, they may, at their sole discretion, terminate negotiations with that Proponent and either negotiate a Contract with another Proponent or choose to terminate this RFP process and not enter into a Contract with any of the Proponents. They may also at their sole discretion, send out a new RFP for this project should it be unable to negotiate a Contract with the successful Proponent or another Proponent.



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## **Continuation of Work**

Based on the recommendations of the final report and subject to CLLS approval should future work be identified to advance or enhance this initiative, CLLS being satisfied with efforts to date at its discretion may enter into an agreement with the successful Proponent without issuing a new RFP for the identified new work.

## **3. Proposal Preparation**

### **Signed Proposals**

The Proponent must ensure that his/her submission includes the Cover Page of this RFP, signed by a person authorized to sign on behalf of the Proponent and to bind the Proponent to his/her Proposal and the terms of this RFP.

### **Irrevocability and Validity of Proposals**

By submission of a clear and detailed written notice, the Proponent may amend or withdraw his/her proposal prior to Closing Time. After Closing Time, all Proposals become irrevocable and will remain open for acceptance for a period of ninety days from Closing Time. By submission of a Proposal, the Proponent agrees that, should the Proposal be successful, the Proponent will enter into a contract with CLLS.

### **Proponents' Expenses**

Proponents are solely responsible for their own expenses in preparing a Proposal and for subsequent negotiations, if any. CLLS will not be liable to any Proponent whether CLLS accepts a Proposal or rejects all Proposals, for any claims, whether for costs or damages incurred by the Proponent in preparing the Proposal, loss of anticipated profit in connection with the Contract or any other matter whatsoever.

Any Proponent may be required to meet in person or by telephone with the CLLS Selection Committee to explain details of the proposal and the Proponent will be responsible for all costs of his/her attendance and the attendance of any of his/her representatives.

### **Liability for Errors**

While CLLS has taken considerable care to ensure an accurate representation of information in the RFP, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted accurate, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP.



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## **Firm Pricing**

Prices will be firm for the entire Contract period unless specifically stated otherwise.

## **Sub-contracting**

Using a sub-contractor (who must be clearly identified in the proposal) is acceptable. This includes a joint submission by two or more Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly identified in the proposal.

## **4. Additional Terms and Conditions**

### **Acceptance and Rejection of Proposals**

This RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any Proposal will not necessarily be accepted and CLLS and is not bound to enter into a Contract with any Proponent.

### **Right to Amend or Cancel**

CLLS reserve the right in its sole discretion at any time, and for whatever reason to, by addendum, modify, amend, or otherwise change this RFP.

### **Contract**

Notice in writing to a Proponent that he/she has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both events.

### **No Public Announcements**

Proponents will not make any public announcement, or have any communication with the media in connection with this RFP without the prior written consent of CLLS.

### **No Promotion of Relationship**

Proponents will not disclose their relationship with CLLS for promotional purposes, including by means of verbal declarations and announcements through any medium whatsoever.

### **Proprietary Information Notice**

This RFP contains proprietary and confidential information of CLLS which is provided for the sole purpose of permitting the Proponent to respond to this RFP. In consideration of the receipt of this RFP, the Proponent agrees to maintain such information in confidence and not to reproduce or otherwise distribute this information.



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## Assignment of Intellectual Rights

All work carried out as a result of this RFP will be the exclusive property of CLLS and will be surrendered to CLLS immediately upon completion, expiration, or cancellation of the project. CLLS will own all rights, title, and interest in all intellectual property rights, including copyrights, patents, trade secrets and trademarks in any work created that is paid for by CLLS.

## C. Proposal Content and Format

The following format and sequence should be followed in order to provide consistency in Proponents' responses and to ensure that each Proposal receives full consideration. Proposals must be on American standard letter size paper and all pages should be consecutively numbered.

1. Title page: include title of RFP, Proponent's name, contact person, address, telephone number and E-mail address and should be signed by the authorized representative of the lead proponent.
2. Table of Contents: use page numbers.
3. Executive Summary: Briefly describe the key features of the Proposal (2 pages maximum).
4. Corporate Profile: Include a profile of the corporate history including the length of time in business, number of employees, organizational structure (2 pages maximum).
5. Corporate Experience: Describe projects of a similar size and nature for which you have provided similar services that also demonstrates a successful track record of delivering projects on schedule and within budget including one reference for each project detailed (including their complete contact information). (maximum 4 projects with 1 reference for each, maximum 4 pages).
6. Demonstrate a successful track record of delivering similar projects on schedule and within budget
7. Project Understanding (maximum 4 pages):  
Proposal clearly demonstrates understanding of the following (please use these headings in your proposal):
  - Project Deliverables
  - Scope of Work
  - Description of How Requirements Will be Met
8. Project management description: Describe the work plan and schedule demonstrating the approach to be used (maximum 2 pages).
9. Pricing: Provide a detailed breakdown and summary of costs including professional fees (for each professional assigned to the project and the hours/days assigned to the project), disbursements (travel, communication, printing, etc.) and taxes (maximum 1 page).
10. Submissions must not include appendices.
11. File size must not exceed 2 MB and files are to be submitted in Microsoft Word or Adobe PDF format.



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## D. Detailed Project Information

### SCOPE OF WORK

#### Overview

To review previous CLLS documents, develop the appropriate tools to collect input and information from members and stakeholders, through online surveys, hosting a workshop/focus group, and conducting telephone interviews, visiting the lighthouse trail, taking a lighthouse tour, as well as carrying out strategic analysis and research. The successful firm will utilize the previous documents and the data collected to develop a 5-year sustainability plan, which addresses the priorities outlined in this document. CLLS will assist in the collection of data using its database containing stakeholders and member information.

### REQUIREMENTS AND KEY DELIVERABLES

The RFP is broken down into 3 phases as follows:

#### Phase One: Review and Assessment Situational Analysis

To review previous CLLS annual reports and to meet with the steering committee and managing director to review and refine the preliminary work plan. In meeting with the steering committee the criteria for the information needed to develop an action oriented sustainability plan would be developed along with the tools necessary to collect the data needed such as: Surveys and focus group working plans.

#### Phase Two: Engagement

CLLS envisions that engagement will involve:

- 1) An electronic survey tool to members and stakeholders to seek input and buy-in.
- 2) A workshop and focus group session in the city of Thunder Bay.
- 3) Telephone Interviews with donors, volunteers and partners, the scope of questions and numbers of interviews to be determined by steering committee.
- 4) Consultation and interviews with key government ministries and agencies.
- 5) A site visit to CLLS lighthouse assets and to participate in a lighthouse tour



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### Phase Three: Strategic Plan Development

Based on Phase One and Phase Two, the successful firm will develop a five-year sustainability plan that, at a minimum, addresses the following:

- 1) The feasibility of operating multiple sites and the required models of operation on a continuum from full service (Porphyry) to unstaffed sites.
- 2) Prioritizing CLLS programming (at Porphyry, Silver Islet & City of Thunder Bay) initiatives moving forward to ensure appropriate timelines, deliverables and sustainability.
- 3) To review the effectiveness of the current governance model, financial systems and the level of board engagement.
- 4) To develop a marketing strategy to maintain membership interest and to continually provide new and innovative services to members, friends, stakeholders, guests, and tourism opportunities.
- 5) To identify funding opportunities, for capital development as well as for standard operating finances.
- 6) Develop a plan specific to the sustainability of operating Thunder Bay Main's Lighthouse as a tourist destination on Thunder Bay's Waterfront.

### **E. Context**

The Canadian Lighthouses of Lake Superior Inc. a non-profit charitable organization, provides its members and friends with an opportunity to connect with lighthouse history while addressing its mandate to preserve, protect and promote Canadian Lighthouses on Lake Superior.

The vision is to connect tourists, members and friends to the lighthouse trail that stretches across Lake Superior's north shore. The lighthouse trail originates from Thunder Bay's Prince Arthur's Landing and extends out into Lake Superior. It includes two transportation hubs, and four lighthouses. Currently CLLS is faced with an issue of long term sustainability and stewardship. The goal of the sustainability plan would be to set direction and priorities, and to offer a renewed vision for the board and staff. A 5 year strategic plan would identify specific goals with set time frames and identify all the resources required to achieve them. This will bring stakeholders together onto the same page, engage members, simplify decision-making, drive alignment and communicate a cohesive message.

## F. Management Requirements

### Work Plan and Project Schedule

Proponents are required to submit a work plan, itemizing the tasks and sub-tasks they will undertake to complete the project. The work plan should be thorough enough in scope and detail to convey the Proponent's understanding of the project requirements and his/her ability to manage the project. Major meetings and all deliverables should be included and each task should show the start and end date as well as the estimated number of hours or days required to complete the task. Each task should also identify the person or persons assigned to complete the task. In addition, each person's level of effort (time) and required resources should be established.

It is recommended that a diagram such as a Gantt chart be utilized to demonstrate the project schedule.

## G. Pricing

The Proponent shall provide cost detail for each phase and key tasks set out in this RFP and the proposal must include the following components:

- Professional fees in per diem rates;
- Travel expenses including accommodation;
- Other disbursements;
- Administrative/miscellaneous fees;
- Total fees/expenses;
- Reports in Microsoft Word; and
- Includes HST

Proponents are required to provide their payment terms as part of their proposal.

## H. Proposal Evaluation

Evaluation of proposals will be performed by the project steering committee. Selection of the Consultant will be achieved through a formal evaluation process. Proposals will first be checked against mandatory criteria. Proposals not meeting the mandatory criteria will be rejected without further consideration. Proposals that do meet the mandatory criteria will then be assessed against the additional criteria listed below or in any addendum or addenda to this RFP. Additional consideration will be given to proposals that demonstrate a high level of professionalism, innovation and perceived commitment to the project.



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The following are the mandatory requirements:

- Proponent must email or deliver a signed copy of the RFP form (first page of this document) to the “closing location” by the “closing time”;
- An electronic version of the Proposal must be received at the “closing location” by the “closing time”;
- The Proposal must not be mailed, delivered or sent by facsimile;
- The Proposal must contain a cover letter; and
- Size of the file should not exceed 2 MB.

Criteria will be scored as follows:

### **Proponent Qualifications and References (total 40 points)**

#### **1. Corporate and Project Team’s Experience and Qualifications – 35 points**

- a) The proposal must identify all members of the proposal team (including subcontractors if applicable) and their relevant skills, qualifications and experience, the amount of time each team member will devote to the project, roles/responsibilities and team structure.
- b) Knowledge of Northern Ontario’s tourism industry and the marketing of Northern Ontario must be demonstrated.
- c) The proposal should provide evidence of the Proponent’s recent (in the last 5 years) experience and demonstrate the team’s experience in working together in similar projects.

#### **2. Northern Ontario - 5 points**

Preference will be given to Proponents who are based in Northern Ontario or have a partnership with a Northern Ontario consultant who will participate significantly in the implementation of the contract.

### **Management Description (total 50 points)**

#### **1. Approach to the Project and its Deliverables – 25 points**

- a) The proposal should demonstrate the Proponent’s clear understanding of the project by recommending a suitable and innovative approach to the review. The approach must be practical, realistic and clearly articulate how it will achieve the objectives of this RFP.
- b) The proposal should also present evidence of the Proponent’s comprehension of the project scope of work and rationale. Value-added insight that is beyond what is stated in the RFP will be recognized; simple reiteration of the content of the RFP will not constitute the Proponent’s understanding of the project.



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## 2. Quality of Project Management – 20 points

- a) Proponents are expected to describe the proposed approach to overall project management and client liaison and reporting, including a detailed work plan with timing of milestones/deliverables.
- b) In addition, Proponents should be able to demonstrate a successful track record of delivering similar projects on schedule and within budget.

## 3. Document Quality – 5 points

- a) As it is considered to be precursor of the quality of the final product, written proposals will be assessed in terms of overall quality; i.e., organization, presentation/appearance, clarity and conciseness.
- b) Proponents may, if they wish, provide samples of relevant work that may be of interest to the proponent. This will be in addition to the maximum number of pages prescribed earlier in this document

## Pricing (total 10 points)

### 1. Pricing – 10 points

Proposals within budget will be evaluated based on the cost breakdown in phases. The budget must provide detailed costs for each of the deliverables and milestones including professional fees, disbursements, the preparation costs for reports, HST as applicable and other related costs. All costs must be reasonable and total budgets will be factored into the final consideration.