

Calgary Brand Creative Strategy & Execution

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Responses Due: October 12, 2022

Calgary Economic Development Ltd.

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2. Introduction

Calgary Economic Development Ltd (CED) invites Calgary-based qualified firms to submit a proposal for the Calgary Brand Creative Strategy & Execution RFP. A proposal, in electronic form, together with six hardcopies must be submitted as outlined in clause 17. The electronic copy should be sent to the attention of the contracting manager by email as noted in clause 15. The hardcopies must be submitted in a sealed envelope stating Calgary Brand Creative Strategy & Execution (RFP #2209-01) before the closing date with the Vendor's name on the outside of the envelope. Late proposals will not be accepted.

CED, Tourism Calgary and the City of Calgary will be collaborating in the selection process of the successful firm and together will be the key decision makers for the deliverables of the Calgary Brand Creative Strategy and Execution.

3. Timelines

RFP Release	Sept 20, 2022
Deadline for Questions	Sept 30, 2022
Proposal Submission Date	Oct 12, 2022
Shortlisted Vendors Notified	Oct 21, 2022
Meetings with Shortlisted Vendors	Oct 31-Nov 4, 2022
Successful Vendor Notified	Nov 9, 2022
Project kick-off	Nov 14, 2022

*Ideal timeline, which is subject to change

4. Definitions

"CED" means Calgary Economic Development Ltd.

"Tourism Calgary" means the destination marketing and development organization for Calgary's tourism industry.

"City of Calgary" refers to the municipal government of the City of Calgary.

"Civic Partners" refers primarily to the City of Calgary, CED, Tourism Calgary, Platform Calgary, Calgary Arts Development Association, CMLC, and Calgary Downtown Association. For a full list of Calgary's civic partners, please see here: <https://www.calgary.ca/our-finances/civic-partners-funding.h>.

"Request for Proposal or "RFP" means this document including attached appendices.

"Contracting Manager" means the person identified in clause 15 of this RFP.

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"Vendor" means an organization responding to this RFP.

"Proposal" means a Vendor's response to this RFP and includes all of the Vendor's attachments and presentation materials.

"Selection Committee" means the committee that will be reviewing RFP proposals and overseeing work on this project. The committee is made up of representatives from CED, Tourism Calgary and the City of Calgary.

"Services" means the duties, tasks, and responsibilities of the Vendor as described in this RFP.

5. Standard Form Contract

By submitting a Proposal, a Vendor acknowledges it agrees that the terms and conditions of this RFP are incorporated by reference into its Proposal. If a Vendor's Proposal is accepted the Vendor will be expected to execute CED's standard contractor agreement. Vendors who are unwilling to abide by these standard terms and conditions should not submit a Proposal.

6. Vendors Questions

All questions regarding this RFP must be directed via email to the Contracting Manager. Enquiries and responses may be recorded and may be distributed to all Vendors.

The Vendor must immediately notify the Contracting Manager in writing of any ambiguity, divergence, error, omission, oversight, or contradiction in this RFP discovered by the Vendor and request whatever clarification is required to prepare the Vendor's Proposal.

In order for CED to deal effectively with Vendor questions or concerns about any terms, conditions or requirements of this RFP, including the standard terms and conditions, such questions or concerns must be communicated in writing to the Contracting Manager in accordance with the Timeline indicated in clause 3 above. Questions received after this time will be answered if, in the opinion of CED, the circumstances warrant and time permits.

7. Conflict of Interest

Vendors must fully disclose, in writing, to the Contracting Manager on or before the Proposal Submission Date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest then known to Vendor between the Vendor and CED and/or the Selection Committee. CED may reject any Proposal where, in the opinion of CED, the Vendor is or could be perceived to be in a conflict of interest.

8. Vendor Expenses

The Vendor is responsible for all costs of preparing and presenting its Proposal.

9. Confidentiality

All information provided by or obtained from CED, Tourism Calgary and the City of Calgary in any form in connection with this RFP either before or after the issuance of this RFP, including any confidential information is the sole property of CED, Tourism Calgary and the City of Calgary and must be treated as confidential; is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract; must not be disclosed without prior written authorization from CED; and must be returned by the Vendor to CED, or destroyed if held in electronic format, immediately upon the request of CED.

10. Background

Over the past several years, CED, Tourism Calgary, and the City of Calgary have worked collaboratively to build a brand strategy, story and framework to create a distinct and sustained brand for Calgary.

Without a doubt, recent times have brought incredible change and challenges to our city, communities and businesses. This change resulted in the need to assess how our current story resonates and aligns with our internal and external marketing efforts, and how it is currently serving to strengthen Calgary's competitive identity – locally, regionally and internationally.

Together, CED, Tourism Calgary and the City of Calgary embarked on a comprehensive engagement process to strive to understand the unique experiences, stories and perspectives that shape our city. This process included:

- Virtual workshops with more than two hundred people across 126 organizations and 34 sectors.
- Eight, two-hour virtual focus groups with residents, visitors and business travellers.
- 20 virtual focus groups with visitors from across North America.
- A survey of Calgary Economic Development, Tourism Calgary and City of Calgary employees across a variety of departments.
- A series of telephone interviews and other community and civic partner surveys
- A complete review of other partners' proprietary research

We worked tirelessly to ensure all engagement was inclusive of a broad range of individuals, taking into account age, gender, ethnicity, sexual orientation and geographic location.

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The final step of our process was a brand co-creation session. Individuals with diverse perspectives came together to create an evolved brand statement that is an authentic representation of our city today, its core values and our aspirations for how we will be perceived in the future.

Following testing with a broad group of community members, the brand statement has been validated as the right story for Calgary that we should tell locally, nationally and internationally. We are looking for the right partner to help us move to the next phase and develop a creative strategy and expression for it that will unify the community around its storytelling.

11. Purpose of the Project

CED, Tourism Calgary and the City of Calgary intend to partner with an agency to bring the updated Calgary brand statement to life through a creative strategy and engagement plan that can help us build a community centric brand.

12. Objective of the Project

We are looking to develop a shared and consistent narrative for Calgary that will influence positive perceptions of Calgary locally, nationally and internationally.

The key to our success will be to create a platform that inspires our communities to own and foster the brand story and promise. We want this to be a brand that is embraced, celebrated and used in storytelling by all. Our approach must be focused on aligning community and civic partners and enabling them to tell the Calgary story via their own channels. Our goal is a feeling of shared ownership of the Calgary brand.

13. Deliverables

The following are expected outputs from this project:

- **Creative Strategy:** A strategy for how to bring the new brand statement to life creatively and visually.
- **Manifesto & accompanying video:** A manifesto to communicate the brand and what it stands for to educate and inspire key partners. The video will be for socialization purposes only and not for the general public.
- **Storytelling playbook:** A guide to enable the community and civic partners to bring the brand to life in their areas through storytelling. The playbook will

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outline best-practices, tools and tips to create authentic and memorable content, across all channels, that is aligned with the brand. The guide will feature examples from the local community and key partners.

- **Brand standards:** A guide to the brand and its primary visual and written standards. Our approach must take into account civic partners who share a visual brand identity, primarily the City of Calgary, CED, Tourism Calgary, Platform Calgary, Calgary Arts Development Association, CMLC, and Calgary Downtown Association. For a full list of Calgary's civic partners, please see here: <https://www.calgary.ca/our-finances/civic-partners-funding.html>
- **Engagement plan:** A plan for how to engage the community and civic partners to ensure alignment, adoption, and a feeling of shared ownership of the Calgary brand.
- **Brand workshop prep & execution:** Community and civic partner workshop planning and execution support (as required), stemming from the engagement plan.

CED, Tourism Calgary and the City of Calgary will entertain other suggested deliverables by Vendors.

In the Proposal response, the Vendor will provide a timeline and detailed schedule of activities and steps (i.e., approach) for the completion of this work.

CED will provide additional context on the updated brand statement to all Vendors who indicate their intention to submit a response to this RFP. Vendors will be required to sign a non-disclosure agreement. Please contact jarthurs@calgaryeconomicdevelopment.com to declare your intention to submit and request background documents.

14. Fees and Payment Terms

Proposals should include a full breakdown of the Vendor's fees and disbursements in completing the Services. Please include the following with breakdown of costs:

- Per diem rates;
- Travel, if required;
- Administration overhead;
- IT costs;

Prices must be stated in actual dollars and cents expressed in Canadian funds and inclusive of all taxes except for GST, which should be itemized separately.

Please provide options for the project team to contribute to reduce project costs and be prepared to consider which aspects of the proposal might be optional.

15. Contracting Manager

For the purposes of the provisions of information surrounding this contract or the administration of the contract, the Contracting Managers are:

Calgary Economic Development Ltd.

Attention: Jennifer Arthurs, Senior Director, Marketing & Communications

500 Centre St S 32nd Floor

Calgary, AB T2G 1A6

Canada

Telephone: 403-862-2636

Email: jarthurs@calgaryeconomicdevelopment.com

16. Proposal Evaluation Criteria

Vendors should be aware that certain mandatory requirements have been set out in the Evaluation form. Proposals that fail to provide these requirements may not be evaluated. See Appendix A for Report and Evaluation criteria.

17. Submission Information

Proposals must be received by email and hardcopy before 16:00 MDT, October 12, 2022

Please send or deliver 6 printed hardcopies of the proposal to:

Calgary Economic Development Ltd

500 Centre St S 32nd Floor

Calgary, AB T2G 1A6

Canada

Attention: Jennifer Arthurs, Senior Director, Marketing & Communications

Email: jarthurs@calgaryeconomicdevelopment.com

- After the Proposal Submission Date, CED may post the identity and addresses of the Vendors.
- CED may elect to not consider any proposal that:
 - Is received after the exact time and date noted above.
 - Does not indicate the request for proposal's title, closing date and Vendor's name on the proposal in response to the RFP;
 - Is delivered to an address other than that provided above;
 - Transmitted proposals will be accepted if the proposal is received before the submission deadline to the email address provided above.

18. CED Reservation of Rights

CED reserves the right:

- To not consider, or to reject, any or all Proposals in whole or in part for any reason whatsoever in its sole and absolute discretion;
- To accept any proposal in whole or in part, even if it does not comply with the terms of this RFP or is not the highest rated proposal in accordance with the evaluation criteria;
- To short list Vendors, and require a presentation by the Vendors short-listed and/or the provision of additional information by such short-listed Vendors;
- To, at any time, add, delete or modify this RFP and to have the Vendors advise CED of the effect of such changes on their Proposal and/or have the Vendors resubmit their Proposals in light of same;
- To negotiate at any time with any one or more of the Vendors to the exclusion of the other Vendors; and
- To not proceed, for any reason, with this RFP or the project contemplated in this RFP.

19. Intellectual Property

Unless otherwise agreed and confirmed in writing:

- (a) All material, including but not limited to programs, reports, notes, maps, drawings, photographs, data, forms and other records prepared, created, written or recorded by ("**IP**"): (a) the Vendor, or (b) CED or (c) the Vendor and CED jointly, in connection with the Services under any agreement incorporating the terms and conditions of this RFP, a proposal, or as a deliverable under any agreement arising therefrom (an "**Agreement**"), will be the property of CED, Tourism Calgary and the City of Calgary; accordingly, the Vendor hereby assigns to CED all rights, title and interest it may have from time to time in such material and all intellectual property rights therein will vest in CED.
- (b) During the term of the relevant Agreement, the Vendor shall have a non-exclusive, non-transferable license to use such IP of CED, Tourism Calgary, the City of Calgary and other civic partners or IP which is jointly created for the sole purpose of providing and completing the Services. Upon the termination or completion of a specific project or Agreement, the Vendor will promptly return such material to CED whether completed or not. Notwithstanding the preceding sentence, the Vendor may retain for archival purposes a single copy of each item of such material; and
- (c) Every invention, discovery or improvement developed by the Vendor in the course of, or in connection with, performing the Services under an Agreement where the invention, discovery or improvement has been initiated or directed or specifically requested by CED, will be the property of CED, Tourism Calgary and the City of Calgary and, accordingly, the Vendor hereby assigns any

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intellectual property right to any such invention, discovery or improvement developed to CED. The Vendor will cooperate fully in the establishment and maintenance of all intellectual property rights accruing hereunder to CED. This provision will survive the termination of any Agreement and to the extent necessary or desirable, the Vendor will take such actions as are reasonably requested by CED after termination of an Agreement with respect to intellectual property rights created during the term of the Agreement.

The parties acknowledge and confirm that any intellectual property that was developed prior to the relevant Agreement, or that was developed by the Vendor independently from such Agreement with CED, Tourism Calgary and the City of Calgary or that was developed at the sole initiative of the Vendor without any prior initiation or direction or request from CED, Tourism Calgary, and the City of Calgary will be outside the scope of this clause 16.

If the Vendor needs access to data of CED in order to carry out Services under an Agreement incorporating the terms and conditions of this RFP, CED will grant a non-exclusive, non-assignable license to have access to and to use that data.

20. No Further Contract or Liability Arising from RFP Process

By submitting a Proposal, the Vendor agrees and acknowledges that:

- Nothing in this RFP nor the submission of the Proposal nor the review and consideration of the Proposal by CED nor any communication between the parties in relation to the RFP or the Proposal will operate to obligate any party to enter into any further business relationship with the other party and, in particular, if CED decides to engage the Vendor in connection with any Proposal or the subject matter of the RFP then such engagement may only occur pursuant to a written agreement that has been signed by both parties and, absent such written agreement, CED will have no further liability or obligation to the Vendor in connection with the subject matter of the RFP;
- The Vendor is participating in this RFP process at its sole risk and expense, and CED will not be liable to the Vendor for any costs, expenses or liabilities incurred by the Vendor in any way arising in connection with the Vendor's participation;
- CED has made no representations other than those expressly stated in this RFP;
- CED has the right to cancel this RFP at any time, CED may reissue this or a similar request for Proposal at any time, for any reason whatsoever or decide not to reissue it for any reason, without incurring any liability and no Vendor will have any claim against CED as a consequence; and

The Proposal and any accompanying documentation submitted by the Vendor will become the property of CED and will not be returned.

APPENDIX A – EVALUATION CRITERIA

Calgary Brand Creative Strategy & Execution: RFP Evaluation

A. Written submission: 75%

Criteria	Possible Points Awarded	Mark	Comments
<p>Quality of submission:</p> <ol style="list-style-type: none"> 1. Clear and concise 2. Quality of writing 	10		
<p>Team competence and resources:</p> <ol style="list-style-type: none"> 1. Experience of the project team, including the following competencies: <ol style="list-style-type: none"> a. Experience building brands and their creative platforms b. Knowledge of brand strategy, and creative strategy c. Experience with partner/community engagement c. Ability to develop creative assets that support brand frameworks and storytelling (with creative examples) 2. Relevancy of past projects (work from 2 – 3 projects <u>must</u> be provided; references are encouraged but not required) 	30		

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<p>Approach and deliverable content:</p> <ol style="list-style-type: none"> 1. Alignment to RFP requirements is clear (10) 2. Approach & methodology (20): <ol style="list-style-type: none"> a. Creativity/innovativeness of approach b. Clarity of approach to meet set objectives and outcomes a. Deliverables meet all criteria and requirements set out in the RFP 3. Project management, including (10): <ol style="list-style-type: none"> a. Clear and feasible schedules, work plans, and timelines b. Progress reporting (budget and project updates) 	40		
<p>Fees (ranked separately):</p> <ol style="list-style-type: none"> 1. Fees have been clearly outlined and are competitive 2. Breakdown of fees and disbursements 	20		
Total	100		

B. Presentations: 25%

Only shortlisted candidates will be asked to develop a presentation at which time instructions and evaluation criteria will be shared.

Each criteria receives a score out of 5 unless otherwise noted