

**Request for Proposal for:**

# **Discover Halifax**

**Consultation Services – Regional Event Strategy & Major Event Policy**

**Date Issued: Friday, January 31, 2025.**

**Submission Deadline: Tuesday, February 18, 2025.**

## **Table of Contents:**

<b>Introduction</b>	<b>Page 2</b>
<b>Administrative Requirements</b>	<b>Page 2</b>
<b>Eligibility</b>	<b>Page 2</b>
<b>Enquiries</b>	<b>Page 2</b>
<b>About</b>	<b>Page 2</b>
<b>Background</b>	<b>Page 3</b>
<b>Project Outline</b>	<b>Page 3</b>
<b>Scope of Work</b>	<b>Page 4</b>
<b>Timing</b>	<b>Page 8</b>
<b>Proposal Structure</b>	<b>Page 8</b>
<b>Evaluation</b>	<b>Page 9</b>



## Discover Halifax

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### Introduction

Discover Halifax is issuing this request for a proposal for consulting services to support the organization's role in event development.

### Administrative Requirements

For tendering, legal, and billing purposes, the client is Discover Halifax.

### Eligibility

Prospective proponents may not be eligible to submit a proposal if current or past interests may, in the opinion of the Board of Directors or Executive of Discover Halifax, give rise to a conflict of interest in connection with this project.

### Enquiries

All enquiries related to this RFP are to be directed to Angela Petry, Executive Administrator, using the contact information below. Information obtained from any other source is not official and may be inaccurate. Enquiries and responses may be recorded and distributed to all proponents at the option of Discover Halifax.

**Angela Petry**  
**Executive Administrator**  
**Discover Halifax**  
E: [apetry@discoverhalifaxns.com](mailto:apetry@discoverhalifaxns.com)

**Answers to all questions are posted publicly and available [here](#).**

Questions are answered as they are received and posted in this document.

### About

Discover Halifax is an incorporated company created in partnership between the Halifax Regional Municipality, the Hotel Association of Nova Scotia, and participating industry members. Its mandate is to increase visitation and visitor yield to Halifax on a year-round basis. The organization is responsible for promoting both group business and leisure travel from external markets.

## Background

Halifax is a dynamic city celebrated for its vibrant culture, rich history, and exceptional quality of life. In recent years, it has established itself as a premier destination for national and international events, hosting world-class gatherings such as Canoe 22, the 2023 North American Indigenous Games, the 2024 Juno Awards, and the Canada Sail Grand Prix. These successes highlight Halifax's ability to deliver exceptional experiences that captivate participants and visitors on a global scale.

Equally significant are Halifax's community-driven and homegrown signature events, which reflect the city's unique character and cultural vibrancy. Events like the Halifax County Exhibition, Halifax Jazz Festival, Halifax Pride, the SEDMHA hockey tournament, and concerts at the Shore Club foster a strong sense of pride and belonging while highlighting the creativity and diversity of the local community. These events contribute to the cultural richness that sets Halifax apart.

Recognizing the need for a strategic approach to enhancing its event ecosystem, the 2019 STAT Pro Report emphasized the importance of a coordinated vision for event development in Halifax and provided the basis for continued work developing this ecosystem.

In 2022, Halifax Regional Council initiated efforts to create a Major Event Policy, approving a values-based approach in 2024. This framework is intended to give event organizers, and the agencies that support them, the information, tools, and support they need while clarifying expectations for everyone involved.

In 2023, a new service agreement between Halifax Regional Municipality (HRM) and Discover Halifax established the Festivals and Events Department, tasked with leading the attraction, and development of festivals and events in Halifax. The recently completed Event and Venue Assessment Project provided a comprehensive evaluation of Halifax's event-hosting infrastructure, identifying key strengths and gaps while laying a critical foundation for future strategic planning and investment.

Building on this foundation, Discover Halifax, in collaboration with HRM and with the support of Events Nova Scotia and Events East, is developing a regional event strategy and a values-based major event policy. This dual initiative aims to maximize the cultural, social, and economic benefits of events while fostering inclusivity, sustainability, and community well-being.

Through these efforts, Halifax is poised to build on its momentum and position itself as a vibrant hub for major events, community festivals, and signature celebrations. By prioritizing collaboration and community values, this initiative will strengthen Halifax's identity and ensure a thriving, diverse, and impactful event ecosystem.

Click [here](#) for a copy of the 2019 STAT Pro Report.

Click [here](#) for a copy of the 2023 Major Event Policy Framework report.

## Project Outline

The Regional Event Strategy and Major Event Policy initiatives aim to provide a comprehensive framework to guide Halifax's growth as a hub for major events, community festivals, and signature celebrations. This dual initiative will align events with community values and maximize their cultural, social, and economic impact.

The project comprises two interconnected components:

### 1. Regional Event Strategy

The Regional Event Strategy will establish a vision and actionable priorities for Halifax's event landscape over the next 10-years and provide a 5-year action plan for implementation. It will outline a clear path for the attraction, development, and support of events at all scales, emphasizing community engagement and sustainability. This strategy will also highlight opportunities for leveraging Halifax's unique cultural assets and home-grown events, ensuring they are central to the region's identity and growth.

Key objectives include:

- Identifying strategic priorities for event development, support, and attraction.
- Engage stakeholders and community to align in priorities.
- Assess and strengthen the support framework for recurring local events, ensuring they have the tools and resources needed for long-term success.
- Assess and strengthen the support framework for major events, ensuring Halifax maintains and grows its competitive advantage.
- Establish actionable recommendations to guide investment, collaboration, and capacity building across the event ecosystem.
- Defining tools for measuring the success and legacy of events.

### **Advisory Committee**

An advisory committee comprising of representatives from Discover Halifax, HRM, Events Nova Scotia, Events East, and other key stakeholders will oversee the development of the strategy. This committee will provide feedback, ensure alignment with shared goals, and help reflect community priorities throughout the process.

## **2. Major Event Policy**

The Major Event Policy will build on the strategy by providing a structured, values-based approach to event governance, funding, and support. It will clarify roles, responsibilities, and expectations for event organizers, municipal departments, and partner organizations, ensuring consistency and transparency in how major events are planned, delivered, and evaluated.

Key objectives include:

- Develop a governance framework clarifying roles and responsibilities for stakeholders.
- Engage stakeholders to align priorities across the community.
- Establish funding and permitting frameworks that support values and priorities.
- Manage growing risk in major events.
- Provide event organizers with clear tools and expectations for effective planning and execution.
- Review and improve existing support structures for events.
- Ensure alignment with municipal goals, values, and priorities.

### **Guiding Principles**

The project is guided by the following principles:

- **Inclusivity and Equity:** Ensuring strategies and policies are accessible and representative of Halifax's diverse communities.
- **Sustainability:** Prioritizing environmental, cultural, and economic sustainability to create lasting legacies.
- **Community-Centric Approach:** Placing local pride, engagement, and cultural identity at the forefront of event planning.
- **Collaboration:** Fostering strong partnerships across municipal, provincial, and community organizations to create a cohesive event ecosystem.

### **Advisory Committee**

The project team will guide the major event policy, and the Regional Event Strategy Advisory Committee will remain informed of progress.

## **Scope of Work**

The Regional Event Strategy and Major Event Policy are interconnected yet distinct components designed to strengthen Halifax's event ecosystem.

- **Regional Event Strategy:** Focuses on the "what" and "why" by setting the overarching goals, strategic priorities, and actionable steps to grow Halifax's events ecosystem. It establishes a 10-year roadmap and a 5-year action plan.
- **Major Event Policy:** Focuses on the "how" by providing the values-based governance structure, operational standards, and tools required to implement the strategy. It defines expectations,

responsibilities, and processes to ensure events align with Halifax's values and priorities, while enabling effective planning, execution, and evaluation.

Proponents may submit proposals for either or both components. The work must align with Halifax's community values, priorities, and long-term goals.

## **Component 1: Regional Event Strategy**

The Regional Event Strategy establishes a 10-year vision and roadmap for Halifax's event ecosystem, supported by a 5-year action plan. It focuses on fostering community engagement, economic growth, and cultural enrichment through strategic event development, support, and attraction.

### **1. Strategic Review and Situational Analysis:**

- Conduct a review of Halifax's current event landscape, including a comprehensive analysis of available data, studies, policies, procedures, plans, and funding programs.
- Assess the effectiveness of current governance structures, permitting processes, and funding mechanisms, identifying any bottlenecks or inefficiencies.
- Evaluate alignment with regional priorities and plans.
- Identify opportunities for strategic growth that balance economic impact, tourism, and community benefits.

### **2. Stakeholder Engagement:**

- Develop a comprehensive engagement plan, considering the needs of the outlined companion studies and the Major Events Policy, targeting a diverse range of stakeholders, including:
  - HRM Special Events Advisory Committee, Special Events Task Force, HRM departments, partner agencies, event organizers, and rights holders.
  - Community groups, cultural organizations, sports associations, and Indigenous communities.
  - Local businesses, tourism operators, sponsors, and residents.
- Conduct or facilitate up to 30 group workshops or stakeholder interviews to gather broad and inclusive input.
- Launch public and targeted online surveys to gather additional feedback from residents and relevant organizations.
- Offer an online survey for stakeholder groups to provide input into this strategy.
- Compile and provide comprehensive stakeholder feedback to the project teams of the companion studies.

### **3. Develop Vision, Guiding Principles, and Priorities**

- Lead the development of a shared vision for the Regional Event Strategy, capturing long-term goals for Halifax's event landscape.
- Lead the definition of guiding principles and priorities rooted in Halifax's values, with clear short-, medium-, and long-term priorities.
- Validate the vision and principles.

### **4. Major Events Bidding & Development**

- Identify and outline strategies and actions to maintain and improve Halifax's competitiveness in securing major events, aligned with regional tourism priorities and economic development goals.
- Review and optimize systems and processes for bidding, planning, and delivering major events.

### **5. Implementation and Metrics:**

- A 10-year strategy document that integrates Halifax's values, with a 5-year action plan focusing on measurable community, cultural, and economic outcomes
- Recommend tools and metrics for evaluating the success and legacy of events, ensuring alignment with values-based principles.

### **Deliverables**

- A 10-year strategy document with a 5-year action plan.
- A summary version for distribution.
- All infographics, charts, and visual aids.

- A stakeholder engagement summary, including key findings and recommendations.
- Metrics and tools for assessing impacts.

Note – Discover Halifax, with the support of the successful proponent, will work with graphic designer to brand and design a product for public distribution.

## Component 2: Major Event Policy

The Major Event Policy provide governance, operational standards, and support mechanisms to guide the planning, execution, and evaluation of major events in Halifax. The policy will align with the Regional Event Strategy and establish clear expectations for all stakeholders.

The policy must reflect a values-based approach, prioritizing inclusivity, sustainability, community impact, and legacy.

### 1. Policy Framework Development:

A values-based governance structure for major events in Halifax will be developed, clarifying roles and responsibilities for municipal departments, event organizers, and other key stakeholders. This framework will facilitate effective collaboration, ensuring decisions are aligned with HRM's strategic values and goals.

- Roles and responsibilities for HRM, event organizers, and tourism partners will be defined.
- Clear operational standards will be established for event permitting, risk management, and operational support.
- Mechanisms will be outlined to encourage cross-departmental collaboration and ensure that Discover Halifax and advisory councils are engaged in the decision-making process.

### 2. Event Categorization

The policy will define a system for categorizing and prioritizing events based on their relevance to the community, accessibility, alignment with tourism and economic goals.

- The policy will identify specific event types and sectors (e.g., arts, culture, sports, festivals).
- Develop appropriate criteria for categorization and definition, which may include relevance to the community, accessibility, cost, investment, attendance, geographic scope, media or public attention.

### 3. Funding Guidelines:

Transparent and values-driven funding criteria will be developed to ensure financial resources are allocated in a way that supports both values and long-term goals. The policy will review existing funding structures and propose improvements to enhance their effectiveness and alignment.

- Develop criteria and guidelines for funding allocations to events that reflect Halifax's values and priorities.
- Review existing funding structures and recommend improvements to enhance transparency, effectiveness, and alignment with values-based objectives.

### 4. Standards for Event Planning and Expectations:

This policy will establish a framework or standards for events and event support in Halifax, focusing on areas such as accessibility, sustainability, community inclusion, and public safety. These frameworks and standards will ensure that events contribute positively to the region's values and priorities, while promoting Halifax as a sustainable and welcoming event destination.

- Recommend practical tools and resources to help event organizers meet these standards.

### 5. Event Bidding and Legacy Framework:

The policy will establish a strategic framework for major one-time events in Halifax, detailing an approach to bidding, development, planning, legacy, and evaluation of these opportunities. This includes creating a structured approach to assessing potential events based on Halifax's values, economic goals, tourism potential, and cultural vibrancy.

- The policy will outline expectations for local engagement, ensuring that events reflect and contribute to the cultural vibrancy of Halifax.
- Create a framework for major event legacy projects.
- Incorporate a bidding framework that:
  - Evaluates the potential economic and community benefits and legacy of major events.

- Ensures alignment with Halifax’s broader values and strategic priorities.
    - Balances economic impact.
  - Identify methods for measuring the social, cultural, and economic legacies of events.
- 6. Stakeholder Engagement and Collaboration:**  
A robust stakeholder engagement process will be central to the policy development and implementation. This process will ensure that diverse voices, including those of community groups, Indigenous communities, cultural organizations, businesses, and residents, are heard and incorporated into the policy.
- Engage a diverse array of stakeholders, including HRM departments, HRM committees, community groups, cultural organizations, Indigenous communities, and residents, to co-develop policy components that reflect shared priorities.
  - Collaborate with the Regional Event Strategy consultant to ensure widespread inclusion in workshops, surveys, and other engagement tools
  - Conduct up to 10 additional individual stakeholder meetings to gather input and feedback.
- 7. Implementation and Evaluation:**  
The policy will include a clear implementation roadmap outlining the steps, timelines, and roles for carrying out the policy. This roadmap will ensure that the policy is effectively put into practice and that key stakeholders are accountable for their roles in the process.
- Provide tools and metrics for evaluating the policy’s effectiveness, ensuring that its impact on tourism, community engagement, and economic growth can be measured.
  - Recommend a process for regular updates and revisions to the policy based on evolving needs and priorities.

Note that the proposal should clearly outline the steps to developing this policy, including opportunities for feedback, and the project plan must include milestone reviews of the scope. In recognition of the potential of growth in the scope of this project through discovery, the project team may actively reduce the scope of this policy work as the project progresses to ensure clarity and reasonableness.

**Deliverables**

- A values-based policy framework.
- Funding guidelines, event categorization, and other specific policy language as required.
- A bidding and legacy framework.
- An implementation roadmap with evaluation tools.

**Collaboration and Reporting**

Proponents of the Regional Event Strategy should expect to conduct a minimum of four milestone presentations to the Advisory Committee, and provide written electronic updates as required.

For the Major Event Policy component, regular coordination and collaboration with the project team are expected during all stages of development.

Weekly or biweekly project team meetings should be expected. If the project is awarded to two proponents, regular coordination meetings will be scheduled between project teams.

**Integration of Components**

For proponents bidding on both components, the deliverables must demonstrate alignment between the Regional Event Strategy and the Major Event Policy. The Strategy should inform the Policy’s focus and implementation, ensuring a seamless connection between long-term vision and operational practices.

To ensure a cohesive approach, proponents bidding on both components must:

- Demonstrate how the Regional Event Strategy will inform and align with the Major Event Policy.

Proponents only bidding on one component must:

- Collaborate with the selected proponent for the other component to align deliverables. This includes sharing stakeholder engagement findings, draft frameworks, and recommendations to ensure consistency and complementarity.
- Proponents submitting proposals for only one component must outline in their bid how they will coordinate with the team working on the other component. This includes timelines for feedback exchange, review meetings, and collaborative revisions.

Partnerships between proponents with complementary expertise for the purpose of bidding on this project are encouraged.

### **Integration with Other Strategic Work**

To maximize efficiency and consistency, consultation sessions for this project will be coordinated to provide input on both the Halifax Regional Integrated Tourism Master Plan 2030, and a planned Provincial Events Strategy.

Proponents are expected to coordinate consultations and share findings to align insights across related projects while focusing on the scope of this RFP. This will ensure alignment while avoiding duplication of efforts.

### **Project Timeline**

This project must be completed at or before June 1, 2025. Any support of an HRM staff report would be completed after this date. Proponents should include a draft project schedule in their submission which details how they may meet this deadline.

### **Submissions**

Submissions must be received by 2:00PM, Halifax local time, on Tuesday, February 18.

Electronic Submissions: Submissions via email will be accepted up to the deadline. Submissions must be made in a single PDF file attached to an email sent to [apetry@discoverhalifaxns.com](mailto:apetry@discoverhalifaxns.com) with “RE: Regional Event Strategy RFP Submission” in the subject line. Any content contained within the body of the email will not be considered for evaluation.

Hard Copy Submissions: Hard copy submissions will not be accepted.

### **Timing**

<b>RFP Issuance</b>	<b>Friday, January 31, 2025</b>
<b>Closing Date</b>	<b>Tuesday, February 18, 2025, 2:00PM</b>
<b>Shortlist</b>	<b>Wednesday, February 26, 2025</b>
<b>Interviews</b>	<b>March 3-7, 2025</b>
<b>Award-by Date</b>	<b>Friday, March 14, 2025</b>

### **Proposal Structure**

Evaluation of proposals is made easier when proponents respond similarly. The following format and sequence should be followed to ensure consistency in proponent response and guarantee that each proposal receives full consideration. All pages should be consecutively numbered.

#### **Introductory Letter**

One-page letter of introduction identifying the proponent that is signed by the person or persons authorized to sign on behalf of and bind the proponent to statements made in the proposal.

#### **Detailed Proposal**

- *Executive Summary:* Brief overview of the approach, understanding of the scope, and expected outcomes.
- *Detailed Approach and Methodology:* Explanation of how you will address the scope of work, with emphasis on integration between component projects. Include approach and plan for consultations.

Note – if submitting for both components, address each separately and demonstrate alignment between them.

- *Experience and Expertise:* Include case studies or examples of similar projects your firm has completed, emphasizing those that involved strategic planning, policy development, and stakeholder engagement
- *Proposed Team:* Detail the team structure, roles, and responsibilities. Provide details of the qualifications and experience of each team member.
- *Work Plan and Timeline:* Provide a high-level timeline with major milestones, stakeholder engagements, and deliverable submission dates.
- *References:* Minimum of three references from similar projects, preferably including government, tourism, or event-focused work.
- *Detailed Budget Breakdown:* Detailed cost breakdown, including fees for each component, travel expenses (if applicable,) and optional tasks. Where possible, the budget should be broken down by component.

## Budget

Proponents are required to provide a detailed cost breakdown as part of their submission. The following guidelines should be observed when preparing the budget:

1. Budget Range
  - The total available budget for this project is \$120,000. Proponents may submit proposals for one or both components, but the cost for each component must be clearly delineated.
  - Proposals exceeding this amount must provide clear justification for additional costs and demonstrate exceptional value.
2. Cost Breakdown
  - Itemized costs for each component (if bidding on both) must be provided, including:
    - Professional fees (hourly or daily rates for each team member).
    - Expenses for stakeholder engagement activities (e.g., workshops, surveys, travel).
    - Administrative costs, if applicable.
    - Any optional tasks or additional recommendations.
  - Indicate total fees, exclusive of taxes.
3. Value for Money
  - Proponents should clearly demonstrate how their proposed budget offers value for money in achieving the project's goals, including efficiencies in stakeholder engagement or integration between components.
4. Optional Tasks
  - Proponents are encouraged to include optional enhancements or value-added services in a separate section, with corresponding costs clearly identified.
5. Disbursements and Payments
  - Payment terms will be milestone-based, tied to the successful delivery of agreed-upon deliverables and approval by the project team.

## Evaluation

Proposals will be evaluated through a multi-stage process. The process includes an initial review, shortlisting, and a meeting/interview stage.

### Proponent Options

Proponents may submit proposals for one or both components of the project. Proposals will be evaluated individually for each component.

Discover Halifax reserves the right to:

- Award a single contract for the full scope of work.
- Award separate contracts for each component to different proponents, based on the strength of their respective proposals.
- Negotiate terms to ensure seamless integration between components if multiple contracts are awarded.

Proponents submitting bids for both components should highlight any efficiencies, synergies, or cost advantages of a combined approach.

### Initial Evaluation

The project team will check proposals against the submission criteria, and proposals meeting all the requirements will then be assessed and scored against the criteria. Incomplete proposals will not proceed to evaluation.

Proposals will be scored for each of the components separately and on their own merits.

Proposals will be evaluated on the following criteria

CRITERIA	DESCRIPTION	Weight
Approach and Methodology	A clear understanding of Halifax’s unique context, opportunities, and challenges  Feasibility and effectiveness of the proposed approach to deliver the scope of work.  Alignment in desired outcomes	30%
Compatibility and Alignment	Availability and capacity to meet the project timeline and requirements  Alignment of team values with the collaborative culture of our community	30%
Experience and Qualifications	Demonstrated relevant experience in similar projects or work  Track record of delivering actionable recommendations and outcomes  Qualifications, skills, and relevant experience of key team members.	25%
Budget	Reasonableness and clarity of the budget relative to the scope of work.  Cost-effective approach demonstrating value for investment  Is within the specified budget range	15%

### Combined Proposals

For proponents submitting a proposal for both components, scores will be combined with a weighted average:

Component 1 – 60%

Component 2 – 40%

Up to a 5% bonus will be given to combined proposals if the combined approach offers demonstrated efficiencies, synergies, and cost advantages.

### **Local Preference**

Up to a 5% bonus will be given to any proponent located within a reasonable driving distance of Halifax. Driving distance is defined as being able to travel to downtown Halifax, attend meetings, and travel home in the same day, reasonably, without staying in a hotel or flying.

### **Ranking**

Proposals will be ranked based on their individual scores by components. Proposals bidding on both components will be ranked separately based on their combined score.

To ensure fairness, the following approach will be used to rank and shortlist proposals:

- The highest ranked proposals for each component, individually
- The highest ranked combined proposals.

### **Shortlisting**

The number of proponents shortlisted and invited for an interview will depend on the evaluation results and the capacity to conduct interviews. Typically, a minimum of 5 proponents will be shortlisted, with the discretion to adjust this number based on the quality and quantity of proposals received.

Discover Halifax reserves the right to include additional proponents in the shortlist if scores are closely clustered and differentiation is required to make a fair determination, a proposal demonstrates unique or innovative approaches not fully captured in the scoring, or a minimum quantity of proposals is not received.

A balanced approach to each component and combined approaches will be applied for shortlisting.

Being shortlisted does not guarantee selection for this project.

Proponents not selected for shortlisting may request written feedback on their submission after the RFP process ends.

### **Interview**

Shortlisted proponents will be invited to participate in a virtual interview with two to four members of the project team. The interview is designed to allow the project team to meet the proposed consultants and engage in an informal conversation to assess alignment, working styles, and the potential for building a collaborative working relationship.

The interview is not intended to be a formal presentation, but rather a discussion that allows the project team to:

- Gain a better understanding of the proponent's approach to the project.
- Clarify details from the proposal, if necessary.
- Evaluate the proposed team's communication style, adaptability, and compatibility with the project team.

The format of the interview will be an informal Q&A. To kick off conversations, the proponent may be asked to walk the project team through their proposal. The project team will ask questions based on the submitted proposal and may include additional questions about the proponent's approach, experience, and methodologies.

Proponents will be given an opportunity to enquire about the project and the project team that may arise from the discussion.

Proponents are encouraged to involve key team members who would be working directly on the project to ensure a meaningful discussion, within reason for a productive virtual meeting. Proponents are encouraged to

familiarize themselves with the project details. While no formal presentation is required, proponents may bring supporting materials or examples of relevant past work to facilitate the discussion.

While the interviews will contribute to the overall evaluation, it is primarily an opportunity to assess the compatibility and alignment between the project team and the proposed consultants. The project team may assign a qualitative score to the interview, which will be factored into the overall evaluation.

Interviews will take place between March 3-7, 2025. Proponents must be available for a virtual meeting this week. Schedule options during that week will be given.

### **Final Selection and Award**

The decision to award is at the discretion of Discover Halifax.

The selection will be based on the combined results of the proposal evaluation, the interview, and a final review of the overall value and fit. This review may include confirming that the proposals meet all requirements of the RFP, that there are no concerns regarding the proponents' capacity or ability to deliver the project, and that the proposals align with the project's objectives and goals.

Based on the results, the project team may:

- Award to a single proponent if a combined bid is deemed more advantageous
- Award multiple proponents if specialized proposals provide better overall value and expertise.
- Not award, if no proponents are deemed able to deliver the project

All shortlisted proponents will be notified of the decision, and the successful proponent(s) will be invited to finalize the contract.

Unsuccessful and shortlisted proponents may request written feedback on their submissions after the process ends.

### **Reservation of Rights**

Discover Halifax reserves the right to:

- Award the contract in whole or in part
- Negotiate with shortlisted proponents to finalize the scope, schedule, and terms
- Not award the contract

Thank you for considering this RFP. Discover Halifax endeavours to be a haven for high performers, and in doing so, we seek to live our values daily. We are seeking a partner equally excited and engaged with this vision.