

Discover Halifax

Request for Proposal (RFP)

Halifax Integrated Tourism Master Plan Update

Date Issued: Tuesday, August 6, 2024

Submission Deadline: Tuesday, August 27, 2024 at 4:00 pm



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Table of Contents

About this Request for Proposals	4
Purpose.....	4
Administrative Requirements	4
Eligibility.....	4
Project Location	4
Timeline	4
Inquiries	4
Conflict of Interest.....	4
Background	5
Project Overview.....	5
Alignment with the Existing Plan	5
Alignment with Federal Tourism Strategies	6
Alignment With Tourism Nova Scotia's Strategic Plan 2024.....	7
Alignment with HRM Strategies & Plans	8
Scope of Work.....	9
Consultant Role.....	9
Discover Halifax's Role	10
Project Communications Support.....	10
Data Analysis Support.....	10
Logistic Support.....	11
Five-Year Plan Update.....	11
Relevant Group Engagement	11
Engage Broadly	12
Online Engagement.....	12
In-Person Regional Engagement	12
Relevant Group Engagement Meetings.....	13
Plan Sustainably	13
Regional Tourism	14
Tourism Carrying Capacity	15
Deliverables	17
Project Management Reporting.....	17
Final Report	17

Submission Requirements	18
Methodology.....	18
Team Competence & Resources	18
Schedule and Availability	18
Fees and Expenses.....	18
Closing Date	18
Evaluation of Proposals and Notification of Proponents.....	19
Scoring System.....	19
Additional Considerations	20
Funding Approval.....	20
Contract.....	20
No Further Contract or Liability Arising from the RFP Process.....	20
Contact Information for Submissions	21

About this Request for Proposals

Purpose

This Request for Proposals (RFP) aims to set forth requirements and seek competitive proposals from experienced and qualified professionals for the comprehensive review and update of the Halifax Integrated Tourism Master Plan (ITMP) for Halifax Regional Municipality (HRM). The completed document must be succinct, accessible for all residents, and provide flexibility for tourism partners. As such, Discover Halifax is requesting proposals from consultants with proven experience in tourism planning, community, and relevant group engagement, as well as destination and experience development to assist in the development of a Tourism Master Plan that reflects the vision for the future and provides the HRM Council and tourism partners with a guide for future decisions.

This document sets forth the requirements and evaluation criteria for respondents.

Administrative Requirements

Discover Halifax is the client for tendering, legal, and billing purposes. Submissions in response to this RFP assume acceptance of all the terms described herein.

Eligibility

Vendors must be registered companies with the legal authorization to conduct business in the Province of Nova Scotia. Vendor consultants proposed for this project must be legally entitled to work in Canada.

Project Location

The project will be based at the Discover Halifax offices at 1809 Barrington Street in Halifax. The vendor consultants will be expected to attend meetings as required at this location.

Timeline

RFP release date	August 6, 2024
Proposal submission deadline	August 27, 2024 4:00 p.m.
Proposal Evaluation & Selection of Consultant	On or before September 10, 2024
Successful Consultant will Present to the Discover Halifax Board of Directors.	September 19, 2024
Project Completion	On or before March 28, 2025

Inquiries

All inquiries related to this RFP will be directed to the individual noted in the 'Contact' section at the end of this document. Information obtained from any other source is not official and may be inaccurate. Inquiries and responses may be recorded and distributed to all proponents at Discover Halifax's option.

Conflict of Interest

Respondents must fully disclose, in writing, to the person noted in the Contact section, on or before the closing date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest between the Vendor and Discover Halifax and/or HRM. Discover Halifax may reject any proposal where, in the opinion of Discover Halifax, the Vendor is or could be perceived to be in a conflict of interest.

Background

Discover Halifax is the official destination marketing organization (DMO) for Halifax, Nova Scotia, established in 2002 to promote the Halifax Regional Municipality (HRM) as a premier year-round destination for leisure, business, and event travelers. Discover Halifax is a non-profit organization aiming to maximize economic and social benefits from tourism for residents, visitors, and investors. Working with industry partners, Discover Halifax showcases the best of the region to the world. It seeks to shape the future of tourism through strategic planning, investment, and design, with a vision to be globally recognized as the favourite city in Canada. The organization is governed by a Board of Directors comprising representatives from various tourism industry sectors, including accommodations, attractions, events, and transportation.

Project Overview

The existing Halifax Integrated Tourism Master Plan (ITMP) sets out a shared vision, principles, and timelines for region-wide initiatives proposed by our many tourism partners. Guided by the Tourism Master Plan, our communities, people, and industry weathered the difficult pandemic period. Through this, we have established the Halifax Region as a great place to visit, work, play, and live.

The existing plan can be found at this link (<https://discoverhalifaxdmo.com/integrated-tourism-master-plan/>).

Discover Halifax and its partners recognize that the Tourism Plan must be regularly reviewed. The ITMP review will be initiated with opportunities for all residents and relevant groups to participate and contribute to an updated plan. The purpose of this review and update is to ensure that the ITMP:

1. Aligns with relevant Federal, Provincial, and Municipal Plans or does not conflict with them
2. Has regard to the matters of significant regional or community interest
3. Is consistent with the objective of the Halifax Regional Municipality
4. Conforms with the plans of our Tourism Partners

The project's ultimate objective is to establish new efforts and prioritize investments in the tourism industry. This will maximize the economic and social benefits for the people who live, visit, and invest in our region. This will be accomplished by identifying and aligning key relevant groups, current and envisioned projects, and tourism planning efforts for the region.

Alignment with the Existing Plan

In the context of the existing Halifax Integrated Tourism Master Plan, "integrated" refers to a comprehensive and cohesive approach to tourism planning and development that aligns and coordinates various components and relevant groups involved in the tourism sector. This integration aims to ensure that all aspects of tourism development work together harmoniously to achieve common goals and objectives. Here are the key elements of the tourism master plan relative to the community integration:

1. **Cross-Sector Collaboration:** Engaging various sectors, such as transportation, accommodation, attractions, local businesses, government agencies, non-profits, and community groups, to create a unified tourism strategy.
2. **Strategic Alignment:** Ensuring that tourism initiatives align with broader economic,

environmental, and social policies and strategies to maximize benefits while minimizing potential negative impacts.

3. **Comprehensive Planning:** All aspects of the tourism environment, including infrastructure, service quality, and our visitor's experience, are considered and developed in a coordinated manner.
4. **Sustainable Development:** Building upon our investment in the GDS index and incorporating sustainability principles ensures that tourism development is environmentally friendly, economically viable, and socially responsible.
5. **Relevant Group Engagement:** Actively involving all relevant groups, including local communities, tourists, businesses, and government entities, in the planning process ensures that diverse perspectives are considered, and that the tourism plan benefits all parties involved.
6. **Data-Driven Decision Making:** Collecting and analyzing tourism data to understand trends, monitor performance, make evidence-based decisions, and inform our strategies.
7. **Continuous Improvement:** Implement mechanisms for regularly reviewing the tourism master plan and updating initiatives to adapt to changing circumstances and emerging trends to remain relevant and practical.

The tourism plan review and update should build upon the existing successful efforts to establish a holistic, collaborative, and strategic approach to tourism development that seeks to unify different sectors and relevant groups to achieve sustainable and inclusive growth in the tourism industry for the benefit of our communities.

Alignment with Federal Tourism Strategies

In 2019, the Federal government announced the investment in enhancing the products and experiences Canada offers to tourists. The “Creating Middle-Class Jobs: A Federal Tourism Growth Strategy” report focused on products and experiences that play to communities’ strengths, elevate local revenues, and disperse international visitors beyond the usual destinations and the summer season. The strategy suggests exploiting and developing our special characteristics to attract more tourists to our communities. In so doing, we will be better able to convince tourists to get off the beaten path, explore the lesser-known parts of the country, and visit during the off-peak seasons.

A competitive tourism sector starts with a commitment to quality and differentiation. Canada must offer exciting, compelling, and singular offerings for tourists to see, do, and increasingly share via social media. If Canada is to be widely known as a premier international destination, unique products and experiences are vital to stand out in a crowded field. The Canadian Experiences Fund has five key product lines for investment:

1. **Winter and shoulder-season tourism:** Investing in winter and shoulder season offerings to draw more international tourists to Canada’s unique winter experiences and scenic fall landscapes.
2. **Indigenous tourism:** Supporting Indigenous communities in presenting their histories, traditional stories, creative arts, and contemporary values to the world while creating new economic opportunities.
3. **Rural and remote tourism:** Prioritizing investments in rural and remote areas to create middle-class jobs and new economic opportunities, enticing tourists to explore lesser-known parts of

the country.

4. **Farm-to-Table/Sea-to-Table and Culinary tourism:** Promoting Canada's world-class cuisine and diverse culinary experiences, including culinary trails, Indigenous culinary experiences, food festivals, and farmers' markets.
5. **Inclusive tourism:** Prioritizing investments in LGBTQ2 tourism, ensuring safe and respectful sites, and supporting major and smaller Pride festivals.

Building upon the previous work, in 2023, the Federal government released a new Tourism Growth Strategy, *Canada 365: Welcoming the World. Every Day. - The Federal Tourism Growth Strategy*. This strategy aims to leverage Canada's diverse attractions and cultural heritage, rebuild and grow the tourism workforce, enhance infrastructure, promote sustainability, and increase investment in tourism assets. By doing so, Canada seeks to solidify its position as a top global destination, drive economic growth, and create a resilient and inclusive tourism industry that supports both urban and rural communities across the country.

Key components of the strategy include:

1. **Investing in Tourism Assets:** Enhancing and upgrading well-known attractions and supporting digitalization and sustainability.
2. **Embracing Recreation and the Great Outdoors:** Promoting year-round recreational activities and leveraging natural landscapes to attract tourists.
3. **Growing Indigenous Tourism:** Supporting Indigenous-led tourism initiatives to offer unique cultural experiences and promote economic development.
4. **Attracting International Events:** Securing more international events to drive tourism and economic activity across different seasons.
5. **Improving Coordination:** Establishing a Federal Ministerial Council to align government policies and strategies better to support tourism growth.

Both Federal strategies (2019 & 2023) are committed to quality and differentiation, recognizing that Canada's unique products and experiences are vital for standing out in the competitive global tourism market. The continued focus on diverse, inclusive, and sustainable tourism highlights the importance of adapting to changing traveler preferences and ensuring long-term growth for the sector.

Alignment With Tourism Nova Scotia's Strategic Plan 2024

The Tourism Industry Association of Nova Scotia (TIANS) and Tourism Nova Scotia (TNS) are co-leading the development of a tourism sector strategic plan that will inspire a broader approach to economic growth and quality of life in Nova Scotia. The plan will establish a new vision for tourism, considering the needs of businesses and organizations, Nova Scotians and their communities, and traveller preferences and expectations.

Through engagement with industry, government, and community representatives, the strategic plan will be a framework everyone can use to guide their actions and investments in the coming years to build a strong and sustainable tourism industry. The consultation themes from the spring 2024 engagement included the following:

1. **Access and Connectivity:** Consistent air, ferry, and road access is crucial for Nova Scotia's tourism. Investments are needed to attract and retain transportation links and ensure easy intra-province travel and connectivity.

2. **Year-Round Tourism:** Sustainable tourism growth requires year-round visitor capacity. Aligning community building, product development, and marketing efforts can enhance off-season tourism through festivals, sports, cultural events, and business meetings.
3. **Labour and Industry Capacity:** The industry faces skilled labour shortages and can benefit from innovative workforce models, technology, and AI. Strategies to reduce labour requirements and enhance business competitiveness are essential.
4. **Unique Cultures and Communities:** Leveraging Nova Scotia's rich cultural heritage, including Mi'kmaw, African Nova Scotian, Acadian, and Gaelic cultures, is vital. Enhancing cultural tourism products and inclusive marketing can drive growth.
5. **Environment and Natural Assets:** A healthy tourism economy depends on a well-managed natural environment. Promoting environmental stewardship and integrating tourism into environmental policies can attract eco-conscious travelers.
6. **Alignment for Growth:** Collaboration among community, industry, and government is key to sustainable growth. A unified Nova Scotia brand and strategic investment in tourism can maximize returns and drive success.

When completed, the plan will consider factors such as seasonality, product, people, quality, and the interconnectivity between tourism and the province's social, cultural, and economic health. The provincial tourism sector strategic plan will be released in the summer of 2024.

Alignment with HRM Strategies & Plans

Integrating tourism with HRM's community development plans will help distribute tourism's economic benefits more evenly and promote sustainable practices. By collaborating with HRM partners, we aim to present a unified narrative highlighting our identity, values, and attractions to create an authentic and compelling image for visitors.

The consultant should review HRM's numerous strategies, plans, and studies, such as the Regional Plan, Accessibility Strategy, Performing & Visual Arts Venues Study, and Rapid Transit Strategy. They should also consult with HRM staff as needed. ***Sharing our Stories: The Halifax Regional Municipality's Culture and Heritage Priorities Plan*** will provide significant context to the ITMP, informing decisions on culture and heritage for the next decade.

The report outlines actions and recommendations related to tourism, including promoting cultural attractions and events, supporting multicultural festivals, collaborating with tourism partners, protecting heritage sites, improving transit services, incorporating diversity into marketing, and creating cultural hubs. It also highlights tourism's economic impact and the importance of sharing local stories and promoting Indigenous tourism.

Scope of Work

Discover Halifax (DH) is seeking proposals for a detailed review and update of Halifax's Integrated Tourism Master Plan (ITMP) to align with sustainable development, economic growth, and cultural preservation goals. Respondents are expected to put forward proposals that fulfill the anticipated key requirements for this project.

This RFP invites skilled consultants or teams with expertise in tourism planning, sustainability, and relevant group engagement to evaluate and improve our current tourism strategy. The project will assess the ITMP's compliance with tourism best practices, economic and environmental sustainability, and social inclusiveness to enhance our destination's appeal and community well-being. Proposals should offer innovative review approaches, including data collection, relevant group involvement, and sustainability integration methods, alongside the team's credentials, project experience, and a comprehensive timeline and budget. This effort reflects our commitment to adapting our tourism sector to future challenges and opportunities, benefiting travelers, businesses, and local communities.

Consultant Role

The consultant company must have prior experience preparing destination strategies for Destination Marketing Organizations (DMOs), specifically within Canadian tourism destinations. This experience is crucial as it ensures a deep understanding of the Canadian tourism market's unique characteristics, challenges, and opportunities. The consultant's portfolio should demonstrate successful projects highlighting their ability to create comprehensive, forward-thinking strategies aligning with local and national tourism goals, including sustainable and regenerative tourism practices. Familiarity with Canadian regulatory environments, cultural contexts, and market dynamics is essential to deliver a practical and innovative strategy tailored to enhance the destination's appeal and competitiveness within the national and international tourism landscapes.

Discover Halifax encourages collaboration between local consultants and national or international consultants. This team should be led by a senior project manager(s) who will manage the review and update of the tourism master plan. This role involves overseeing the entire process from inception to completion, ensuring that all project goals and objectives are met efficiently and effectively. The senior project manager is responsible for coordinating and leading a multidisciplinary team, which may include sub-consultants, tourism advisors, planners, analysts, economists, and other relevant disciplines. They ensure that all team members are aligned with the project's vision and objectives and adhere to the established timeline and budget.

The senior project manager also acts as the primary point of contact between the consulting team and Discover Halifax. This includes maintaining open and transparent communication, providing regular updates, and addressing any issues or concerns during the project. They must facilitate collaboration and ensure all parties are informed and engaged throughout the process. Discover Halifax anticipates that the project manager/team lead will meet with and deliver presentations to the project's senior oversight levels during the project as follows:

1. Presentation¹ to Discover Halifax Board of Directors on **Thursday, September 19, 2024**.
2. Project Startup Meeting with the ITMP Advisory Committee;

¹ Only the successful consultant will be expected to present to the Board of Directors

3. Mid-Term Startup Meeting with the ITMP Advisory Committee;
4. Presentation with the ITMP Advisory Committee;
5. Presentation to Discover Halifax Board of Directors; and
6. Presentation to HRM's Community Planning and Economic Development Committee (CPED).

In managing the update of the tourism master plan, the senior project manager oversees the collection and analysis of data, integrating new insights and trends, and developing strategic recommendations. They ensure the updated plan is comprehensive, data-driven, and reflects current and future tourism trends.

The engagement process is another critical component of the senior project manager's role. They are responsible for managing the delivery of public engagements and ensuring that public feedback is collected, documented, and incorporated into the final plan. They must also manage relevant group relationships, address any concerns, and ensure that the interests and needs of various relevant groups are considered.

Discover Halifax's Role

Discover Halifax recognizes that supporting the tourism master planning process across a large and diverse municipality with extensive relevant group consultation requires a collaborative, strategic, and transparent approach between client and consultant. Discover Halifax is committed to ensuring the consulting firm can access necessary resources, including data, personnel, and logistical support from Discover Halifax and its partners. The project leadership (day-to-day) contact will come from the Destination Development branch of Discover Halifax. The Discover Halifax CEO and Project Advisory Committee will act as the primary governance and process oversight body for the Tourism Master Plan project.

Project Communications Support

The consulting team shall create communication, messaging, and content related to the engagement efforts. Discover Halifax staff will support the consultant by managing contact lists and coordinating with government agencies, media, and public relations. Discover Halifax will also be responsible for distributing press releases and media coverage.

Discover Halifax will work with the consulting team to identify all relevant groups, including political figures, community leaders, and interest groups. It will then assist in creating detailed plans for engaging each relevant group, including tailored communication strategies and consultation methods.

This comprehensive approach ensures that the communications plan is well-organized, effective, and capable of addressing the diverse needs of a multifaceted project beyond the consultant's role.

The consultant will also have access to the Discover Halifax Media Hub. This extensive digital library includes photography, b-rolls, finished videos, and brand assets.

Data Analysis Support

Discover Halifax will provide the project team access to its considerable tourism data and metrics, including Smith Travel Research (STR) data, a key data source for tracking tourism, particularly in the hospitality industry. STR provides comprehensive data and analysis on hotel performance and other aspects of the tourism and hospitality sectors. Discover Halifax also subscribes to AirDNA, a data analytics company that provides insights and market intelligence for the short-term rental industry. It

collects data from various rental platforms, such as Airbnb and Vrbo, and analyzes it to deliver comprehensive reports. In addition, Discover Halifax has invested in cellular data that was collected passively from the TELUS network. This data can be used to determine essential traits, such as the unique count of visitors, the length of stay, and daily unique counts for visitors or residents in HRM. All available data will be fully disclosed during the project startup.

Logistic Support

Discover Halifax staff will assist in selecting and booking appropriate venues for relevant group meetings and consultations. We will also help schedule these meetings and send out invitations to relevant groups, ensuring that all necessary parties are informed and able to attend. Any associated costs for the venue rental will be covered by Discover Halifax.

Five-Year Plan Update

Discover Halifax believes the vision, goals, and themes for the existing ITMP will continue to guide the updated plan. To ensure the updated ITMP's effectiveness, we recommend an approach that bolsters analytics and evidence-based recommendations. The 28 initiatives in the existing ITMP are a foundation for this five-year plan update.

The updated ITMP will guide necessary priority investments in infrastructure, policies, and services that align with the vision, thereby supporting initiatives and new projects as needed. This approach ensures that strategic planning is informed by a detailed understanding of both internal and external factors affecting tourism in HRM.

The consultant will analyze demand generators, regional characteristics, interdependencies, and existing infrastructure to evaluate HRM's status as a prime visitor location. This analysis aims to identify strengths, weaknesses, and areas for enhancement in HRM's tourism sector.

The consultant will examine visitation data and travel habits, focusing on interregional travel within Nova Scotia and the Maritimes. This assessment will include current visitation levels, visitor demographics, and behavior patterns.

Reviewing opportunities and challenges in the HRM tourism industry involves consulting relevant groups and analyzing regional and industry-specific opportunities. The consultant will identify unique selling propositions and tourism assets for each area.

Finally, integrating findings across these assessments will involve connecting insights from the destination's current state, market-based opportunities, and general opportunities assessments. The consultant will highlight overlaps to understand how existing conditions and market trends can enhance future opportunities.

While there is potential overlap between the assessments, this overlap is beneficial. It ensures that insights are cross-referenced and that the strategy development process is cohesive. For instance, understanding the current state of tourism infrastructure and services is crucial for identifying market opportunities and vice versa. Similarly, relevant group consultations can reveal insights that affect the current state's analysis and market opportunities.

Relevant Group Engagement

1. Prepare and Deliver an Engagement Plan, including the objectives and framework for group consultations.
2. Provide advice and feedback on the relevant group consultation invite list (to be developed by Discover Halifax).

3. Facilitate regional engagement meetings (8 in-person events + 1 virtual).
4. Prepare a discussion guide for one-on-one consultation meetings (25-30 meetings).
5. Capture findings of relevant group consultation meetings.

Note: Discover Halifax will administer invitations and handle facility arrangements for consultation sessions.

Engage Broadly

The consultant will collaborate with Discover Halifax (DH) to identify the critical public and relevant groups for a detailed tourism plan (ITMP) review. This involves leveraging online platforms to facilitate broader community engagement for the Integrated Tourism Master Plan (ITMP) review, recognizing the importance of inclusivity for those hindered by scheduling conflicts, mobility issues, or geographical distance.

In parallel, the consultant will develop an in-person community engagement program to complement online efforts, targeting crucial discussions on tourism's social and environmental impacts. This strategy fosters trust, support, and active participation among relevant groups and residents to craft a more sustainable tourism strategy. Discover Halifax plans to include eight strategically located in-person meetings across various regions alongside a comprehensive, relevant group engagement process involving diverse groups such as Indigenous and African Nova Scotian tourism leadership, sectors like accommodations and food service, and critical infrastructure relevant groups. This multifaceted engagement strategy is designed to tailor discussions to specific interests and concerns, using varied formats, such as roundtable discussions and workshops, to gather in-depth insights.

Online Engagement

The consultant should describe their approach to an engagement strategy promoting active participation and collaboration among participants. Utilizing an online engagement platform can broaden participation opportunities and accommodate members who face obstacles in attending in-person meetings due to schedule conflicts, physical disabilities, or geographical challenges.

An online engagement strategy may include interactive elements like polls, breakout sessions, virtual whiteboards, and real-time feedback tools to collect community input and measure sentiment efficiently. Furthermore, feedback collection mechanisms should be considered, including surveys, online forms, and open-ended questions to compile valuable insights related to the tourism master plan.

In-Person Regional Engagement

In-person community engagement is a crucial aspect of the ITMP review process. The consultant is expected to design a program that fosters trust and support among relevant groups and residents. This engagement program should facilitate discussions focused on tourism's social and environmental impacts, contributing to creating a more sustainable tourism strategy. Furthermore, the program should empower residents to play an active role in shaping the future of their community, thereby enhancing a sense of civic pride and ownership over tourism-related initiatives.

Discover Halifax envisions that this engagement program will encompass 8 meetings distributed across HRM in the following locations:

- | | |
|--|----------------------|
| 1. Halifax Airport Area | 1 Engagement Session |
| 2. Bedford-Sackville | 1 Engagement Session |
| 3. Dartmouth-Cole Harbour | 1 Engagement Session |
| 4. Downtown, North End, and West End Halifax | 1 Engagement Session |

- | | |
|---|----------------------|
| 5. Peggy's Cove Coastal Region | 1 Engagement Session |
| 6. Eastern Shore -Sheet Harbour | 1 Engagement Session |
| 7. Eastern Shore - Musquodoboit Harbour | 1 Engagement Session |
| 8. Musquodoboit Valley | 1 Engagement Session |

Relevant Group Engagement Meetings

Discover Halifax estimates between 25-30 bilateral meetings with various relevant groups. Discover Halifax will work with the consultant to determine the relevant groups and partners for consultation. This work will include appropriate engagement with relevant groups and lead agencies as follows:

1. Indigenous Tourism Leadership (supporting tourism strategies)
2. African Nova Scotian Tourism Leadership (supporting tourism strategies)
3. Acadian Tourism Leadership (supporting tourism strategies)
4. Sectors (Accommodations, Retail, Food and Beverage, Tour Operators, Iconic Attractions, Nighttime Economy)
5. Demand Generators and Infrastructure (Key relevant groups as identified)
6. Marketing and Travel Trade (Key marketing partners as identified)
7. Meetings and Conventions (M&C service providers and conference properties)
8. Events (Key relevant groups as required)
9. Transportation and Air Access (Airport, Rail, and transportation providers)
10. Visitor Experience, Policy, Placemaking, and Wayfinding (City planning, Metro Transit, Parking, Build Nova Scotia, JRTA, etc.)
11. Cruise & Shore Excursions (Port of Halifax, Atlantic Canada Cruise Association, etc.)

The consultant shall consolidate and analyze the feedback to identify common themes, priorities, and recommendations. Then, using these insights, the consultant shall refine the tourism master plan, ensuring it reflects the diverse perspectives of the involved groups.

Plan Sustainably

The journey towards sustainability and achieving net-zero emissions requires Destination Marketing Organizations (DMOs) to monitor, track, and report their carbon footprint and energy transition goals and adhere to environmental, social, and governance standards. For Discover Halifax, this involves crafting a sustainability plan rooted in a comprehensive understanding of climate change, population growth, and societal shifts. The goal is to develop a long-term sustainability strategy that aligns with municipal efforts and capitalizes on the events and accommodation sectors to drive positive environmental change. Recognizing sustainability as a fundamental goal, it becomes imperative to integrate it into the Integrated Tourism Master Plan (ITMP) and the operational ethos of partner organizations.

To achieve this, Discover Halifax is participating in the Global Destination Sustainability Index, a framework for benchmarking and enhancing the sustainability performance of destinations worldwide.

The consultant should ensure the ITMP has a clear sustainable/regenerative tourism and events strategy woven throughout the final plan document. This strategy needs to be forward-thinking and

regenerative and encompass a bold vision with clear objectives, targets, action plans, and a roadmap for a better future for the visitor economy over multiple years (5+ years). It must align with HRM’s sustainable development agenda (HalifACT) and the United Nations’ Sustainable Development Goals (SDGs).

For this scope, the successful delivery of a plan that fulfills the needs of the GDS Index shall be a key project benchmark.

Regional Tourism

HRM is a large geographical area; however, "regional" refers to activities, policies, or characteristics specific to a smaller area within this larger context, thus making it "localized" to those areas. The ITMP review and update must incorporate localized regional tourism plans (Musquodoboit Valley, Eastern Shore, Peggy’s Cove Coastal, etc..) to provide a clear picture of the strengths and weaknesses and their external opportunities and threats. This analysis is fundamental in developing the ITMP as it helps identify the factors influencing the region's tourism success or failure. HRM strengths include a unique diversity of natural landscapes and rich cultural heritage, which are the region's competitive advantages.

The regional plans will assess opportunities, including emerging travel trends, increased demand for specific tourism experiences such as eco-tourism or cultural tourism, and strategic partnerships. By systematically examining these elements, regional plans will aid relevant groups in crafting strategies that leverage strengths and opportunities while addressing weaknesses and mitigating threats. This strategic approach is instrumental in forming a resilient and sustainable tourism plan that aligns with the region's goals, enhances its competitive position, and fosters economic growth.

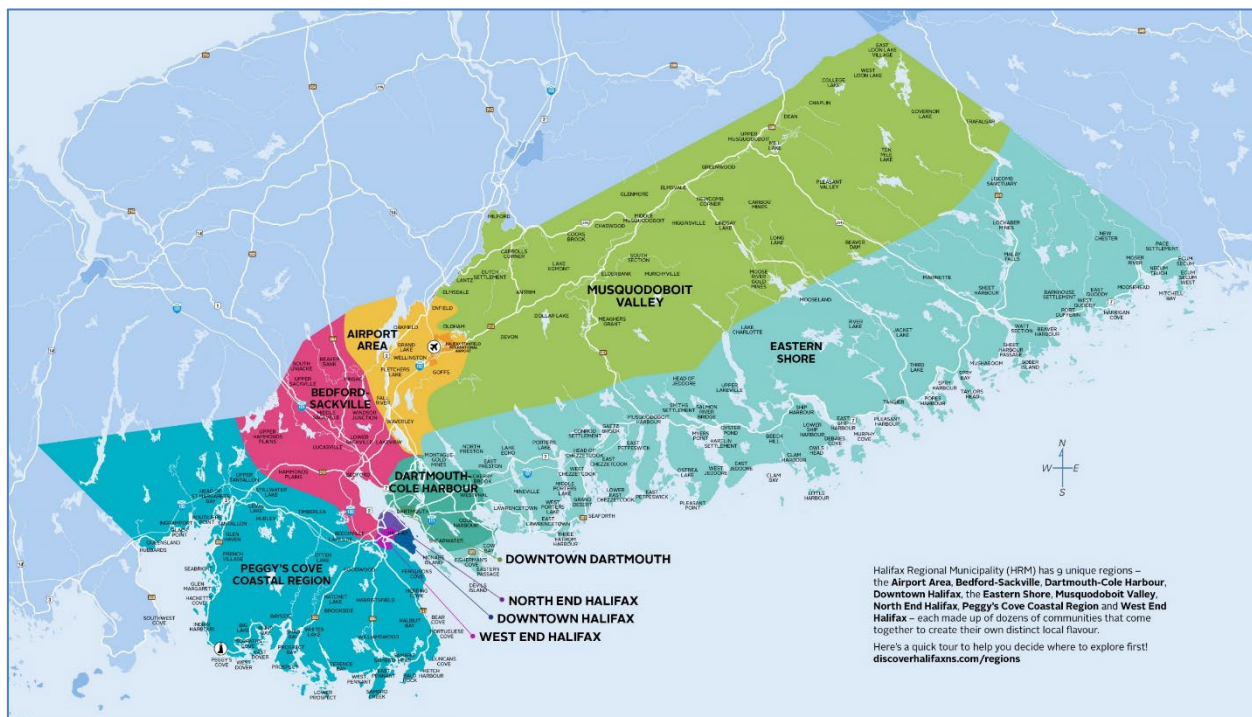


Figure 1 Tourism Regions of the Halifax Regional Municipality

Engaging with community groups is crucial for understanding the perspectives and experiences of residents directly impacted by tourism. The region plans should also include a high-level understanding of infrastructure improvements, community governance, marketing, and critical

investments in transportation, accommodations, and recreational facilities to enhance visitor satisfaction. Lastly, the plans should discuss how prioritizing sustainable practices and responsible tourism activities can foster long-term success and resilience in tourism.

Tourism Carrying Capacity

ITMP aims to ensure that measures relative to sustainability and regional tourism are grounded in the geography of such a large municipality. Accordingly, Discover Halifax envisions the consulting team utilizing Geographic Information System (GIS) modelling. GIS models assist decision-makers by integrating spatial data and analytical equations to evaluate alternatives and make informed decisions.

As an essential decision support tool to guide the ITMP, this modelling effort should inform discussions about tourism planning by providing visual depictions of tourism pressures and opportunities throughout HRM but with particular emphasis on crucial points of interest such as waterfront boardwalks, coastal destinations, parks and national historic sites, beaches, trails, and other major attractions.

During the development of the ITMP, it was identified that while the cruise sector was seen to provide significant economic benefit, there were concerns regarding the sustainability of the growth trajectory—particularly the mix of businesses and the concentration of benefits. There was also a strong desire to identify opportunities to avoid future risks from 'over-tourism' by developing new onshore experiences and dispersing benefits throughout the region more effectively.

Discover Halifax's interest in cruise is focused on "developing new onshore experiences and more effectively dispersing benefits throughout the region." Tour operators are essential intermediaries between tourists and tourism service providers, influencing consumer choices, supplier practices, and destination development patterns. To effectively study opportunities to maximize visitor benefits throughout HRM, the consultant shall incorporate the results of the carrying capacity modelling with identified potential markets and activities that align with visitors' preferences. The consultant should present strategies for local businesses, tour operators, and hospitality providers that leverage carrying capacity opportunities to position the community as an attractive and market-ready destination.

The modelling should assist in estimating the maximum number of visitors that a destination or attraction can sustainably accommodate while maintaining desired levels of environmental, social, and economic integrity. When applied to the dispersion of visitors, theoretical carrying capacity modelling can be a valuable tool for DMOs and operators to plan and manage tourism activities effectively. The modelling process would include the following components:

- a) Identify critical sites and attractions visitors visit for shore excursions, including landmarks, cultural sites, natural attractions, and recreational areas.
- b) Collect data on visitor arrivals, behaviors, and impacts through available surveys, observations, and existing data sources.
- c) Develop theoretical models to simulate various scenarios of visitor dispersion, considering factors like tour operator capacities, excursion durations, transportation logistics, and visitor distribution among sites.
- d) Conduct carrying capacity assessments for each site, evaluating physical capacity, environmental sensitivity, social carrying capacity, and economic impacts on local businesses.
- e) Analyze scenarios to assess the potential impacts of different dispersion strategies, such as varying excursion numbers and timing, introducing new attractions, and promoting off-peak

visitation.

- f) Use insights from modeling to inform decision-making and recommendations to maximize regional tourism economic growth, minimize environmental impacts, and optimize the benefits of visitor dispersion for the destination.

HRM provides public access to several datasets that may help inform the modeling efforts. Not all datasets will be necessary to meet this project's requirements, and proponents should be transparent about the data they will use and ensure that any analysis accurately represents Discover Halifax's needs. The consultants should review these datasets, identify data gaps, and propose methods to obtain relevant and current data for accurate analysis.

One of the significant inputs to the model is the Halifax Green Network Plan (HGPN), which defines an interconnected open space system, highlights ecosystem functions and benefits, and outlines strategies to manage open space. Specifically, the HGPN provides land management and community design direction to maintain ecologically and culturally significant land and aquatic systems and to promote the sustainable use of natural resources and economically critical open spaces.



Figure 2 - HRM's Green Network Plan

The development process of creating a carrying capacity model should ideally encapsulate accepted research processes, including hypothesis formulation, model design, parameter choice, behavioral and interaction rules, and validation. To create a GIS model for tourism physical carrying capacity, DH anticipates various datasets related to the characteristics of the destination, visitor behavior, and environmental factors. Some key datasets include:

1. Geographic Data includes base maps, land cover/use data, topographic maps, and digital elevation models (DEMs) to provide spatial context and terrain information.
2. Environmental Data on natural resources, sensitive ecosystems, protected areas, wildlife habitats, water bodies, and cultural heritage sites.

3. Infrastructure Data on tourism infrastructure such as roads, trails, parking facilities, accommodations, restrooms, and other visitor amenities.
4. Visitor Data on actual visitor numbers that provide insights into past trends and help predict future scenarios, including visitor demographic profiles, travel patterns, and information from tourism surveys, visitor centers, ticket sales, visitor counts at attractions and cellular mobility tracking.
5. Carrying Capacity model criteria include physical space, resource availability, ecological sensitivity, social carrying capacity (e.g., crowding), and infrastructure capacity (e.g., waste management, sanitation).

The analysis and output maps shall support the determination of the maximum number of people that can visit a tourist destination without causing an unacceptable decrease in the quality of visitors' satisfaction and stressing the site's sustainability. Discover Halifax believes that such a model would have significant utility in developing a destination sustainability plan. Furthermore, the model may help manage visitors in vulnerable areas, aiming to prevent damage to the environment and its ecological populations. Discover Halifax accepts that there are many other ways to compute carrying capacity and is open to various methods.

Deliverables

Project Management Reporting

Submit a monthly progress report template within two (2) weeks of the award for client review and acceptance. Progress reporting shall include the scope of work and a log of any changes throughout the project, as well as financial status, including budget and billings, change management log, and contingency management. Additionally, it should include schedule tracking with baseline and progress schedules and a deliverables submission table with proposed dates that are updated as needed.

Final Report

The scope of work involves a comprehensive review and update of the current plan to ensure alignment with sustainable development, economic growth, and cultural preservation goals. This includes data analysis, relevant group engagement, and integrating best practices in tourism planning. The project aims to enhance the region's tourism appeal and community well-being by incorporating innovative approaches and methodologies. The consultant will manage relevant group consultations and online and in-person engagements and develop a sustainability plan aligned with global standards. The final deliverable will be a detailed and updated ITMP that provides strategic recommendations for future tourism development in the Halifax Regional Municipality.

The consulting team shall have access to Discover Halifax's library platform, which contains rights-free images and videos for consultation and report preparation. The vendor consulting team will be responsible for writing the final detailed and summary reports and presentation versions of each.

The successful bidder shall provide 24 bound copies of the Integrated Tourism Master Plan. Additionally, digital formats of the final deliverables, including GIS files, InDesign graphics, and Microsoft Office documents (Word and PowerPoint), must be submitted as specified by Discover Halifax. All digital files should be meticulously organized and submitted on a USB drive or via a secure online file-sharing platform as directed by Discover Halifax.

Submission Requirements

Respondent proposals should include the following information:

Methodology

Clear articulation of the proposed work plan to achieve the Scope of Work.

Team Competence & Resources

Description of the proposed consultants' capability to meet the requirements described in the Scope of Work and the relative level of effort each will apply to the project.

Include related experience of the firm, including the past three similar projects completed with the company name, contact person, and phone number that may be contacted for reference.

Schedule and Availability

The project is set to begin as soon as possible. The successful Project Manager will present their team's project plan and engagement methodology to the Discover Halifax Board of Directors on Thursday, September 19, 2024. The Board presentation should allow for input from the Directors.

The ITMP 2030 project is expected to be completed by March 28, 2025.

Respondents must confirm the availability of their proposed project team to ensure they can meet these scheduling requirements.

Fees and Expenses

Discover Halifax has allocated a budget for the Integrated Tourism Master Plan Review in the range of \$175,000 - \$225,000 CDN (including expenses, excluding HST).

Proposals should include a breakdown of the respondent's fees and disbursements for completing the project. The respondent agrees to invoice Discover Halifax based on the progress of the services. All pre-approved expenses and disbursements will be invoiced as they are incurred, together with a monthly progress billing.

Fee and expense information should be supplied, including a breakdown of costs by major work plan tasks:

- Per Diem rates
- Travel, if required
- Administration overhead
- Sundry and contingency overhead rates
- Software license costs, data information, or research

Closing Date

Digital copies of your proposal must be received by 4:00 p.m., local time, on Tuesday, August 27, 2024. If you choose to send hardcopies of your proposal, their envelopes should be addressed ("Discover Halifax—Attention: Angela Petry") and the project title ("Tourism Master Plan Update").

Late proposals will not be accepted or returned to the proponent unopened.

Addendums or modifications can be made before the Closing Date but will not be accepted after that date. Proposals may be withdrawn by respondents at any time after submission.

Evaluation of Proposals and Notification of Proponents

Discover Halifax will review all submitted proposals to ensure they meet submission requirements. Non-compliant proposals will be rejected, and the respective respondents will be notified. Compliant proposals will be evaluated based on the following criteria:

1. **Understanding the Project and Approach:** The proposal should thoroughly understand the requirements and objectives. The approach should be articulated, showing a strategic plan to achieve the desired outcomes. This includes how the consultant manages the update and public review process, incorporating relevant group engagement and sustainable planning principles.
2. **Thoroughness of the Proposal:** The proposal must be comprehensive, covering all aspects outlined in the RFP. This includes a detailed methodology, project timeline, budget, and clear deliverables. The completeness and clarity of the proposal will be critical in assessing its quality.
3. **Knowledge, Experience, and Professional Standing of Key Personnel:** The proposal should highlight the qualifications, experience, and professional standing of the key personnel involved in the project. This includes previous experience in tourism planning, relevant group engagement, and project management. The proposal should include detailed resumes and references from similar past projects.
4. **Availability of Key Personnel and Ability to Meet the Proposed Schedule:** The availability of the proposed team members to commit to the project timeline is essential. The proposal should demonstrate the team's capacity to meet deadlines and manage the project efficiently within the given timeframe.
5. **Cost of Services:** The cost of the services will be evaluated based on the proposed budget breakdown. While pricing is an important factor, it is not the sole determinant. The proposal should offer a detailed breakdown of costs, including per diem rates, travel expenses, administration overhead, and other related costs.
6. **Performance History on Past Projects:** The proposal should provide a performance history of the consulting team on similar projects, particularly those related to tourism and economic development. This includes the quality of work, ability to meet schedules, cost control, and working relationships with clients, advisory groups, and the public. References and testimonials from previous clients will be considered.

Scoring System

Each criterion will be scored on a scale of 0 to 10, with the following weightings applied:

1. Understanding of the Project and Approach: 20%
2. Thoroughness of the Proposal: 20%
3. Knowledge, Experience, and Professional Standing of Key Personnel: 20%
4. Availability of Key Personnel and Ability to Meet the Proposed Schedule: 10%
5. Cost of Services: 20%
6. Performance History on Past Projects: 10%

The final score will be calculated by multiplying the score for each criterion by its weighting and summing of the results.

Additional Considerations

At Discover Halifax's sole discretion, a winning proposal will be selected, and the submitting respondent will be invited to participate in contract negotiations and finalization. While pricing is a significant factor, the lowest bid will not necessarily determine the winning proposal. Discover Halifax reserves the right to contact individual respondents for clarification or further elaboration on their proposals. Selected proponents may also be required to present their proposals orally.

All submitted proposals and accompanying documentation will become the property of Discover Halifax and will not be returned.

Funding Approval

Please be advised that this project is **subject to funding approval**. The award of any contract resulting from this Request for Proposals (RFP) is contingent upon Discover Halifax securing the necessary funding. No contract will be awarded until the required funding has been obtained and confirmed.

Contract

The winning respondent will be invited to contract negotiations, starting with the RFP submission. If a contract agreement cannot be successfully reached, then Discover Halifax reserves the right to cease discussions with the winning respondent and then either choose another respondent or pursue another avenue to fulfill the requirements.

No Further Contract or Liability Arising from the RFP Process

By submitting a proposal, the respondent agrees and acknowledges that:

- a) Nothing in this RFP, nor the submission of the proposal, the review and consideration of the proposal by Discover Halifax, nor any communication between the parties in relation to the RFP obligates any party to enter into any further business relationship with the other party and, in particular, if Discover Halifax decides to engage the respondent in connection with 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, Discover Halifax will have no further liability or obligation to the respondent in connection with the subject matter of the RFP;
- b) The respondent is participating in this RFP process at its sole risk and expense, and Discover Halifax will not be liable to the respondent for any costs, expenses, or liabilities incurred by the respondent in any way arising in connection with the respondent's participation;
- c) Discover Halifax has made no representations other than those expressly stated in this RFP;
- d) Discover Halifax has the right to cancel this RFP at any time and to reissue it 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 Discover Halifax as a consequence, and the proposal and any accompanying documentation submitted by the respondent will become the property of the Discover Halifax and will not be returned.

Contact Information for Submissions

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Discover Halifax

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