



Canadian Museum of Immigration at Pier 21
Musée canadien de l'immigration du Quai 21

Request for Proposal Brand Strategy

Date of Solicitation: August 10, 2017

Proponent Conference Call: August 28, 2017

Closing: September 5, 2017 at 2 p.m. Atlantic Time

The Canadian Museum of Immigration at Pier 21 is committed to purchasing goods and services to ensure the best overall value. Procurement is conducted with due regard to applicable laws, regulations, trade agreements, internal policies, environmental considerations and competitive processes. Ensure that you have read all procurement documents carefully and that your response includes all of the information requested.

Canada

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1. Request for Proposal

1.1 Executive Summary and Services Required

The Canadian Museum of Immigration at Pier 21 is a national treasure housed within a Canadian landmark. One in five Canadians may have a direct link to this iconic building, but all Canadians are impacted by immigration and how it shapes this country. Entrusted with the important duty to collect, preserve and share Canada's immigration stories; defining and supporting a strong brand will allow the Museum to fulfill this important mandate. Articulating to Canadians, why as a cultural institution we matter and defining how we demonstrate this across all touch points, will allow us to better fulfill our mandate and enrich the visitor experience. As one of only two national museums located outside of the National Capital Region, we need to ensure we are leveraging every opportunity to create awareness and connections with Canadians from coast to coast to coast in-person and on-line.

This can be achieved by adopting a brand-driven organizational culture. This requires the Museum to craft a coherent and relevant story stemming from a shared sense of direction. At the end of this transformative branding process, all employees must clearly understand what our brand promise is and what role they play in bringing that promise to life. This understanding will guide employees from visitor experience to human resources in their day-to-day actions.

The Museum is seeking an agency or group of experts specializing in brand strategy with experience working with museums, historic sites or similar cultural institutions. We are looking for guidance to develop a brand strategy in consultation with our staff, as well as assistance operationalizing this brand across all departments. We require your expertise to help us tell our brand narrative cohesively and translate this to a template for future creative work. Because of the inherent richness and authenticity of our stories, we know a well-crafted brand will have the power to move people on the deepest emotional levels.

Twenty weeks have been allotted for this work to be done with all deliverables completed by March 2, 2018.

1.2 Organizational Overview

The Canadian Museum of Immigration at Pier 21 is located at the Halifax Seaport in Halifax, Nova Scotia. Reopened as an interpretive centre in 1999, Pier 21 told the story of the almost one million immigrants who arrived at this former gateway to Canada between 1928 and 1971. During the Second World War, the majority of Canadian military personnel left from Pier 21 for service overseas.

Pier 21 became a national museum in 2011 and underwent a \$30 million expansion in 2015. In addition to a refreshed Pier 21 based exhibit, a new second permanent exhibit now explores over 400 years of Canadian immigration stories from first contact to present day. The mandate of the museum is to collect, preserve and share Canada's immigration stories for future generations.

1.3 Current Brand Image

On the surface, a museum on the subject of immigration may seem a little dry. But the Canadian Museum of Immigration at Pier 21 is a museum rich with stories. First-hand accounts are used in multiple formats to create an immediate and personal experience for visitors, removing barriers of time and otherness. A visit often provokes newfound interest into the circumstances of one's own family's arrival in Canada. Immersive exhibits and hands-on activities allow people to experience the museum on multiple levels depending on their learning style preference. Daily visitors tell us how unexpectedly moved they were and how they wished they had planned more time for their visit.

News stories addressing the current states of global migration, refugees, citizenship and cultural identity are ubiquitous. Potential visitors should know that a visit to the Museum provides an opportunity to explore their knowledge, beliefs and personal connection to these issues. Through partnerships, outreach, travelling exhibits and media relations, the Museum has a growing presence and awareness nationally and internationally.

1.4 Challenge

Both externally and internally we need our brand to reflect who we are as a cultural institution and where we are going. Since becoming a national museum and the addition of our new exhibits the challenge has been how to succinctly describe who we are and what we do. Often described by others as "Canada's Ellis Island", this description both does not reflect our current mandate and as a Canadian icon unfortunately defines us in relation to an American one.

Today, Pier 21 is known as a site for mainly European, 20th century immigration. How can we imbue it to encompass our broader mandate and the larger story of immigration to Canada? Located on the east coast of Canada, we need to communicate our relevancy to all Canadians. All Canadians including our Indigenous Peoples have been impacted by the legacy of immigration and immigration will continue to shape this country far into the future.

1.5 Scope of Work

A strong integrated brand will raise our profile, build and diversify audiences and increase revenue through increased visitation and philanthropic support. Consultation for this branding project should touch every aspect of a museum, including: Visitor experience and Audience engagement, Collections and Curatorial, Research and Exhibitions, Public programming, Development, Human Resources, Administration, Finance and Communications.

Deliverables of this project will include but at not limited to:

- Brand audit/review;

- Through consultation develop a brand strategy that specifies the organization’s primary audiences, brand values, personality, value proposition, brand positioning and brand promise linked to our corporate plan;
- Translate the above into touch point experiences or actions (i.e. operationalize the brand);
- Craft messages for key audiences including a new positioning tagline and elevator pitch;
- Develop a framework/ template treatments for incorporating new brand positioning in creative executions such as tag line, posters, ad layout etc.; and
- Plan for internal launch.

1.6 Out of Scope

The successful Proponent shall not be responsible for:

- Establishing a new visual identity for the organization. *There is no appetite to invest in a new logo/visual identity. However suggestions on new treatments as described above are in scope;*
- Translation*; and
- External Brand launch.

* While translation services will be provided as required, Proponents must take into consideration that CMI is a bilingual organization and subject to the Official Languages Act. Any proposed creative must work in both official languages as a condition of approval.

2. Contract Terms and Conditions

2.1 Definitions

In this document:

- 2.1.1 The words “CMI” or “Museum” means The Canadian Museum of Immigration at Pier 21
- 2.1.2 The words “Closing Date and Time” means the date and time set out on the cover page for the submission of Proposal(s) after which time no further proposals can be accepted.
- 2.1.3 The word “Agreement” or “Contract” means the agreement to be entered into between the successful proponent and CMI for the services requested.
- 2.1.4 The word “Contractor” means the successful Proponent whose proposal is selected by CMI and enters into a Contract with CMI for the request herein.
- 2.1.5 The work “Proponent” means the vendor(s) who submit proposals for the request in this document.

- 2.1.6 The words “local time” mean the local time at the Museum’s address (Atlantic Time Zone).
- 2.1.7 The words “Proposal(s)”, “Bids” and “Submission(s)” are to be considered as having the same meaning herein and refer to the submission by the Proponent to the request herein.
- 2.1.8 The words “RFP” means Request for Proposals.
- 2.1.9 The works “working language” refer to the working, everyday language internal to CMI. For the purposes of this document and subsequent contract, the working language is English.

2.2 Budget

The maximum funding available for the contract is \$100,000 (exclusive of taxes). This must cover all project expenses. This disclosure does not commit the CMI to pay the maximum funding available.

2.3 Contract Term

Twenty weeks have been allotted for this work to be done with all deliverables completed by March 2, 2018.

2.4 Copyright

All products and services produced in relation to this Contract are property of the Museum.

2.5 Legislative Requirements

- 2.5.1 The Contract shall be construed, interpreted and governed by the applicable laws in force in the Province of Nova Scotia and the laws of Canada applicable therein and the Courts of the Province of Nova Scotia shall have exclusive jurisdiction with respect to all matters relating to this contract.
- 2.5.2 The Contractor shall be responsible for compliance with all current Canadian Federal, Provincial and Municipal Acts, Orders, Regulations and Laws which exist or may come into existence during the term of the Agreement.
- 2.5.3 The working language of the Museum is English.

2.6 Indemnity

The Contractor covenants to indemnify and save harmless the Museum, its directors, officers, employees and agents from and against any and all liabilities, losses, claims, demands, building damage, costs and expenses (including lawyer's fees and litigation expenses on a solicitor and client basis) whatsoever to which CMI, its directors, officers, employees and agents may become subject to as a result of the breach of any covenant, agreement, term or condition of this Agreement or as a result of or in connection with the use and occupation of the Premises, by the Contractor or its servants, agents, employees, contractors, invitees or others for whom it is in law responsible or arising out of or resulting from the negligence or wilful misconduct of the Contractor or its servants, agents, employees, contractors, invitees or others for whom it is in law responsible except where caused by the negligence or wilful misconduct of CMI or those for whom it is in law responsible.

2.7 Insurance

Prior to the implementation of the Contract, the Contractor shall provide proof of relevant insurance policies upon the request of the Museum. These insurance policies will be at a level appropriate to carry out the services herein within the following categories:

General Liability Insurance
Professional Liability Insurance

2.8 Supplier Information Form

Payment for the Services shall commence upon the Contractor signing of the Supplier Information Form (Appendix B) and a mutually agreed upon payment schedule.

2.9 Access to Information

The Contractor acknowledges and understands that CMI is subject to the *Privacy Act* and *Access to Information Act*, and it may, as a result of specific request made under the Act, be required to release this complete document or any other documents it has received related to the contract. The Contractor must clearly indicate "Confidential" on items considered to be company confidential or proprietary information.

2.10 Notices

Any notices required or permitted to be given by the Contractor or the Museum shall be deemed to have been properly and effectively given if delivered personally, sent by facsimile, sent by e-mail or sent by registered prepaid mail to the party whom the notice is to be given.

2.11 Changes, Alterations, Amendments

Changes in the terms and conditions of the contract may be made only by written agreement of the parties.

2.12 Termination

In the event that either party believes that the other materially has breached any obligations under the contract such party shall so notify the breaching party in writing. The breaching party shall have 30 days from the receipt of notice to cure the alleged breach and to notify the non-breaching party in writing that a cure has been effected. If the breach is not cured within the 30 days, the non-breaching party shall have the right to terminate the contract without further notice.

2.13 No Promotion of Relationship

Any publicity or publication related to the contract shall be at the sole discretion of the Museum. Without limiting the foregoing, the Contractor shall not make use of its association with CMI, directly or indirectly communicate with the media in relation to the contract, the subject matter, or undertake any communication with CMI that in the opinion of CMI is unsolicited promotional communication relating to the contract, without prior written consent of CMI.

2.14 Assignment

No right of interest in the Contract shall be assigned by either party without the written consent of the other and no delegation owed, or the performance of any obligation by either CMI or the Contractor shall be made without the written consent of the other party.

2.15 Gender

In the Contract, unless the context otherwise requires, words importing gender include all genders.

2.16 Force Majeure

The Contractor is not liable for failure to perform the obligations as set out in the contract as a result of acts of God (including fire, flood, earthquake, storm, hurricane or other natural disasters), war, invasion, act of foreign enemies, labour dispute, strike or lockout. If the Contractor asserts Force Majeure as an excuse for failure to perform their obligations, they must prove that reasonable steps were taken to minimize delay or damages caused by foreseeable events, that the Contractor substantially fulfilled all non-excused obligations and CMI was timely notified of the likelihood or actual occurrence of the event which invoked the Force Majeure.

3. RFP Submission Information

3.1 Key Dates

RFP Release Date	August 10, 2017
Proponents Call	August 28, 2017 at 11 a.m. Atlantic Time
Deadline for Questions	August 29, 2017 at 4:00 p.m. Atlantic Time
Closing Date	September 5, 2017 at 2:00 p.m. Atlantic Time
Interviews and Phase II Evaluation	Week of September 11, 2017
Project Kick-off	Week of October 9, 2017

3.2 Form of Submission

3.2.1 Submittal Documentation Form

The Proponent must submit a proposal with all the mandatory information requested in this RFP. Proponents shall submit Section 5, RFP Submittal Documentation.

3.2.2 Language

Proposal documents and supporting information may be submitted in either English or French. The working language of the Contract shall be English.

3.3 Proposal Submission Instructions

3.3.1 Location, Date and Time for Proposal Submission

Proposals shall be delivered **ONLY** to the address specified below. We request one (1) original and three (3) copies.

Ashley MacPherson, Procurement and Administration Manager
Canadian Museum of Immigration at Pier 21
1099 Marginal Road, 2nd Floor
Halifax, NS B3H 4P7

Proposals must be submitted and received by **September 5, 2016 at 2:00 p.m. Atlantic Time**. Faxes and/or emails of proposals will not be accepted. Timely receipt and correct direction of proposals shall be the sole responsibility of the Proponent.

3.4 Proponents Call and Enquiries

3.4.1 A **Proponents Conference Call** will be held on **August 28, 2017 at 11:00 a.m. Atlantic Time**. Proponents who wish to take part in the Question and Answer:

Dial 1-888-653-2299
Enter ID# 5270624#

The call will be accessible in French and English. All questions and answers discussed during the Proponent Call along with any questions and answers submitted by email, will be posted as an addendum.

3.4.2 To ensure consistency and quality of information provided to all, the Procurement and Administration Manager will provide any information in respect to enquiries/questions received and the replies to such enquiries/questions without revealing the sources of enquiries on buyandsell.gc.ca. All enquiries regarding the solicitation shall be submitted by 4 p.m. Atlantic Time, August 29, 2017. Questions received after this time will not be answered. Answers to questions will be provided on ongoing basis and will be issued as addenda.

Direct enquiries to:

Ashley MacPherson, Procurement and Administration Manager
Email: amacpherson@pier21.ca

Proponents are only permitted to communicate with the Procurement and Administration Manager. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of the Proponent's proposal.

- 3.4.3 Proponents shall promptly examine all documents and addenda comprising this RFP and shall report any errors, and seek clarification of apparent errors, ambiguities, or other problems as soon as identified. It is the Proponent's responsibility to avail themselves of all the necessary information to prepare a compliant proposal in response to this RFP. The Evaluation Committee is under no obligation to seek clarification of a Proponent's proposal.

3.5 Joint Ventures

The Proponent must clearly and explicitly state whether the bidding entity is or is not a joint venture in accordance with the definition below:

A joint venture is an association of two or more parties who combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise. Joint ventures may be carried on in a variety of legal forms divided into three categories:

- i. The incorporated joint venture.
- ii. The partnership joint venture.
- iii. The contractual joint venture where the parties combine their resources in the furtherance of a single business enterprise without actual partnership of the corporate designation.

If the response to this RFP is made by a joint venture, the Proponent shall describe the precise nature of the joint venture, its legal status and its acceptance of the following general principles:

- 3.5.1 That the signatories are acting and responsible jointly and severally;
- 3.5.2 That the payment of monies under the contract to the identified lead member shall act as a release from all parties;
- 3.5.3 That giving notice by the Museum to the identified lead member shall act as a notice to all parties;
- 3.5.4 That the Museum may, at its discretion in the event of disputes among joint venture parties or changes in its composition, direct that the contract be terminated, without in any way altering the liability of the original signatories for performance of the terms of the contract; and
- 3.5.5 Where the Museum has determined that the joint venture lacks sufficient assets to guarantee its contract performance, financial and performance guarantees may be required from each of the joint venture members.

It is a condition precedent to any contract being awarded to a Proponent that the Proponent provides a copy of the signed Joint Venture Agreement (or equivalent document which defines the participant's roles and responsibilities) if the Proponent is bidding as a joint venture (as defined above).

3.6 Amendments, Withdrawal and Disqualification

After the closing date and time, amendments to a proposal will not be accepted.

In the event that a Proponent wishes to withdraw its Proposal, the Proponent shall immediately notify the Procurement and Administration Manager in writing or by email, before the RFP closing date. Should a proposal be withdrawn, it will be returned to the Proponent after the closing date, and no further consideration will be given to it.

3.7 Costs Related to Solicitation Process

All costs and expenses incurred by the Proponent related to the preparation of the proposal shall be borne by the Proponent. The Museum is not liable to pay such costs and expenses or to reimburse or to compensate the Proponent under any circumstance.

The Museum shall not be responsible for any costs related to any delays in the RFP, in awarding the agreement, or costs associated with any review or the approval process, or with obtaining any government approvals.

3.8 Conflict of Interest

Proponents must fully disclose, in writing to the Procurement and Administration Manager, on or before the closing date of the RFP, any circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Proponent were to become a contracting party pursuant to the RFP. The Evaluation Committee shall review any submissions by Proponents under this provision and may reject any proposals where, in the opinion of the Committee, the Proponent could be in conflict of interest or could be perceived to be in a possible conflict of interest position if the Proponent were to become a contracting party pursuant to this RFP.

3.9 Access to Information

The individuals, or companies, participating in this RFP acknowledge and understand that CMI is subject to the *Privacy Act* and *Access to Information Act*, and it may, as a result of specific request made under the Act, be required to release this complete document or any other documents it has received related to this RFP. Participants in this process should clearly indicate “Confidential” on items within their submission considered to be company confidential or proprietary information.

3.10 The Museum’s Rights

- 3.10.1 This RFP does not constitute an offer of any nature or kind whatsoever by the Museum to any Proponent. The Museum reserves the right to reject all proposals, in whole or in part, at the sole discretion of the Museum.
- 3.10.2 The Museum reserves the right to disqualify any Proponent in the event that its response to the RFP indicates that the manner in which the Proponent provides services may adversely affect the Museum’s existing business relationships or if Public Services and Procurement Canada (PSPC) has determined the Proponent to be ineligible or suspended pursuant to the PSPC Integrity Regime.
- 3.10.3 Furthermore, the Museum reserves the right to:
- i. Ask any Proponent to provide proof that they have the necessary management structure, skilled personnel, experience and equipment to perform competently the work identified in this RFP.
 - ii. Cancel and/or reissue this RFP at any time; CMI will not assume liability for any response preparation costs whatsoever.
 - iii. Request clarification or supporting data for any point in a Proponent’s proposal.
 - iv. Negotiate with the Proponents subject to the constraints of the mandatory requirements of this RFP.
 - v. Make changes to this RFP, including substantial changes provided that those changes are issued by way of a Solicitation Amendment in writing, and is issued prior to the RFP closing date. CMI may do so without incurring any liability whatsoever to any of the Proponents.
 - vi. Maintain sole ownership of the proposals. All materials submitted by a Proponent in response to any part of this RFP shall become the sole property of CMI without payment or liability for payment.

4. Evaluation and Award

4.1 Evaluation Criteria and Process

4.1.1 Criteria and Scoring

There shall be no public opening of the proposals received in response to this RFP.

The criteria specified in this RFP, as possibly amended by Solicitation Amendments, are the **sole criteria** which will be used in the evaluation of proposals.

Proposals will be evaluated and scored in accordance with the following criteria.

Evaluation Criteria	Points
Stage I	
Approach	/30
Experience	/40

Timeline/Schedule	/10
Budget	/20
Stage II – Shortlisted Proponents	
Interview/Presentation	/65
References	/35
Total Points	/200

4.1.2 Process

1. An Evaluation Committee shall evaluate the proposals. Decisions as to the degree to which a proposal meets the requirements of this RFP are within the exclusive judgment of the Evaluation Committee.
2. The top three Proponents shall be contacted for an interview/presentation. Proponents must achieve a minimum pass mark of 60% in each category to qualify for Phase II consideration. Interviews will be conducted by phone or onsite at the Museum during the week of September 11, 2017.
3. The Stage I score will be added to the Stage II score for an overall total score.
4. Scores shall be calculated by adding all criteria scores together for a total score out of 200 points. Proponents must achieve a minimum pass mark of 60% in both Phase II categories to qualify for consideration to be awarded the RFP.
5. It is the intent of the Museum that the Proponent with the highest score overall shall receive the Contract.

4.2 Notification, Award and Debriefing

The Museum will provide a debriefing of a Proponent's proposal, if requested in writing, within ten (10) days of notification that they have been unsuccessful. Requests **must** be submitted to the Procurement and Administration Manager.

5. RFP Submittal Documentation

5.1 Company Information

Request for Proposals: Canadian Museum of Immigration at Pier 21. Please submit information as per this table.

Legal Name:	
Full Address:	
Telephone:	Business (GST) Number:
Website:	
Name and title of person authorized to sign on behalf of the Proponent (Type or Print)	
Signature of person authorized to sign on behalf of the Proponent	
Name and title of RFP Contact / Project Manager (Type or Print)	
Phone:	Email:

5.2 Addenda

Addenda will be issued by the Museum regarding any changes and answers to questions that may arise during the solicitation period. Completion of this section will ensure that you have received and factored this information into your tender total. Failure to identify addenda issued by the Museum may result in the disqualification of your proposal.

Number	Date Issued

5.3 Project Approach

Please explain your project approach, style and process. Proponents shall respond to this section with no more than three pages. The Evaluation Committee shall not evaluate additional pages of a Proponent's submission.

5.4 Experience – Project Staff

Please provide biographies of key staff working on this project including a summary of their relevant experience.

5.5 Experience – Previous Work

Please include at least one in-depth case study that includes a limited number of creative samples. Where possible, highlight work for similar organizations.

5.6 Schedule and Timeline

Please include proposed work schedule and timeline of deliverables.

5.7 Budget

Please provide the estimated cost for all work related to tasks and deliverables outlined in the scope of work including all administrative and project management costs.

5.8 References (3)

Proponents shall submit References for completed projects similar to the request herein. Please provide the following information for each reference:

Name of Company

Name and title of contact

Project Budget

Project Start and End Dates

Relevancy to this RFP

5.9 Supplier Statement

WE: _____ (Supplier Name)

5.9.1 DO HEREBY OFFER to the Canadian Museum of Immigration at Pier 21 to diligently and faithfully provide the services in accordance with the terms and conditions of the RFP.

5.9.2 AND WE HEREBY AFFIRM AND CERTIFY that we:

- i. Have examined to our satisfaction all conditions affecting the Scope of Work.
- ii. Have carefully studied the RFP, including all addenda.
- iii. Have not relied on any information or documents provided by or on behalf of the Museum other than the RFP.
- iv. Have included the information that was required to be submitted, which information forms an integral part of the Submittal Documentation.

5.9.3 AND WE HEREBY DECLARE, REPRESENT, WARRANT AND AGREE THAT:

- i. The Proposal has been executed with full authority and is irrevocable, valid and open to acceptance by CMI for a period of ninety (90) full days from the Closing Date irrespective of the acceptance of any other Proposal or the issue of a notice or acceptance of another Proposal.
 - ii. This Proposal is made by the undersigned without any connection, knowledge, and comparison of figures or arrangements with any other person who might submit a Proposal for the same Work and is in all respects fair and without collusion or fraud.
 - iii. Proposed sub-Supplier (if any) have been given the opportunity to study the RFP.
-