



REQUEST FOR PROPOSALS

"COMMUNITY CONCIERGE" CUSTOMER SERVICE PROGRAM DEVELOPMENT

Issued: January 23, 2012

Submission Deadline: February 10, 2012 at 4:00 PM (EST)

Contact Information:

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Contents

1.0	Project Overview.....	3
2.0	Background.....	3
3.0	Project Goals & Objectives.....	3
4.0	Deliverables.....	4
5.0	Proposal Requirements.....	5
6.0	Submission Requirements.....	6
7.0	Submission Deadline.....	6
8.0	Inquiries and Questions.....	6
9.0	Selection Process.....	6
10.0	General Terms and Conditions.....	7

1.0 Project Overview

The Ontario's Highlands Tourism Organization (OHTO) is seeking proposals from qualified and experienced Consultants to:

- Develop a comprehensive customer service excellence program, and
- Deliver five (5) to six (6) facilitated sessions designed to inform OHTO members about the initiative, create industry "buy-in" for the program, and communicate how businesses can achieve the designation.

The Community Concierge Program will be developed as a customer-service designation program. The program will challenge tourism operators and businesses to deliver quality customer service in all aspects of their organization by measuring their level of service delivery against industry standards and a well-defined set of criteria. The program also asks businesses to become ambassadors of the tourism industry in their local communities through demonstrating their knowledge of other tourism products, services and assets in their area. Achievement of these elements through a rigorous yet attainable customer service program means businesses will be recognized and designated as a "Community Concierge" and customer service leaders in the region.

2.0 Background

Ontario's Highland Tourism Organization

Ontario's Highlands Tourism Organization (OHTO) is a Destination Marketing and Management Organization (DMMO) established October 2010, pursuant to the Ontario Ministry of Tourism and Culture's request to create an independent, industry-led, not-for-profit organization responsible for working with tourism partners to enhance and grow the region's tourism products and marketing activities. The OHTO services provincial tourism Region 11 which encompasses six countries including Haliburton, Lanark, and Renfrew, and parts of Frontenac, Hastings and Lennox and Addington.

Mission

The Ontario's Highlands Tourism Organization (OHTO) will be an industry led collaborative organization whose mandate is to support and grow tourism through organizational development, destination development and marketing.

3.0 Project Goals & Objectives

The goal of this project is to improve the overall quality of customer service delivery in the Ontario's Highlands region and to equip tourism operators with a means to become leaders in customer service.

The Community Concierge designation is intended to enhance and promote service excellence by providing recognition. The designation recognizes and honours outstanding customer service providers, and highlights their vital importance in improving the quality of customer service in the tourism industry in Ontario's Highlands.

The objectives to be achieved by the Consultants in this Project are as follows:

1. Creation of a region-wide customer service designation program that:
 - Is tailored to the tourism-industry in Ontario's Highlands
 - Addresses the unique customer service needs in Ontario's Highlands
 - Is comprehensive and competitive yet also attainable for businesses to achieve
 - Inclusive for all tourism-businesses and cost-effective
 - Is attractive and appealing to the industry and fosters industry participation
 - Provides a means for businesses to improve their delivery of customer service
2. Delivery of facilitated sessions that:
 - Inform businesses about the customer service designation program
 - Inform businesses about the value of customer service and the importance and value of the designation to operators
 - Provide businesses with the step-by-step details of how they can achieve the designation
 - Are dynamic and engaging and create industry enthusiasm, motivation, support, and "buy-in" for the program

4.0 Deliverables

4.1 Scope of Work

The OHTO is soliciting proposals from experienced and qualified Consultants to develop a regional customer service designation program and deliver 5 to 6 facilitated sessions about the program before March 31, 2012.

The summary below reflects the anticipated components required and the project deliverables defined herein are the minimum requirement of the execution of the Project. Should a submitting consultant wish to provide additional deliverables, these should be clearly identified.

The Consultants should be prepared to meet with the Board of Directors and staff intermittently to provide updates on the project and to receive direction.

4.2 Components

4.2.1 Development of a regional customer service designation program

This component shall include the following elements:

- Develop the program aligned with tourism-industry customer service fundamentals
- Develop a method to offer the designation, including criteria and evaluation process
- Provide a framework for training opportunities/resources as part of the program
- Develop application procedure/process
- Create a method of monitoring program success

4.2.2 Delivery of facilitated sessions

This component shall include the following elements:

- Session design and development
- Delivery of five (5) to six (6) half-day information sessions in locations to be determined in Ontario's Highlands

4.2.3 Collaborate with Communications/Graphic Design partners (to be retained) to develop program material

This component will be for the following purposes and shall include the following:

- Marketing and administration materials in print and digital media
- Ensure developed design materials are consistent with the program

5.0 Proposal Requirements

To be considered complete, this RFP submission should address the following components:

5.1 Statement of Understanding

- 5.1.1 An executive summary describing the submitting Consultants understanding of the assignment, including a description of the overall approach, methods and techniques that will be used to produce the deliverables outlined in this RFP.

5.2 Project Plan

- 5.2.1 Describe how you would address the requirements outlined in this RFP.
- 5.2.2 Describe any other objectives and/or deliverables you would include in the development of the Community Concierge program.

5.3 Qualification Submission

- 5.3.1 Detail your experience developing programs and how it can be applied to the OHTO's Community Concierge Program. Include a description of any similar projects undertaken (in appendices).
- 5.3.2 Detail your qualifications as customer service experts.
- 5.3.3 At least three (3) references for work of a similar nature should be included with the proposal submission, which gives permission to the OHTO to contact the clients.
- 5.3.4 Provide any supporting information that will confirm your experience in program development and as customer service leaders.

5.4 Project Costs and Budget

- 5.4.1 Provide proposed project fees and total project costs.
- 5.4.2 Include a detailed budget, including a breakdown of costs by project component.

6.0 Submission Requirements

- 6.1 Two (2) copies of the proposal must be submitted in one (1) sealed envelope. These copies must consist of: one (1) original and one (1) copy. Additionally, one (1) copy must also be sent electronically in PDF format.

Proposals must be sent to the attention of:

**Stephanie Hessel,
Tourism Development & Industry Relations Coordinator
Ontario's Highlands Tourism Organization
9 International Drive, Suite 129
Pembroke, ON
K8A 6W5**

stephanie.hessel@ohto.ca

- 6.2 All proposals must be marked with the bidder's name and reference the title of this project (Community Concierge Program).

7.0 Submission Deadline

- 7.1 All Proposals including hard-copy and digital versions must be received no later than: **February 10, 2012 at 4:00 PM (EST).**
- 7.2 Late submissions will not be considered.
- 7.3 Submitting consultants are asked to notify the OHTO of their intention to submit a bid for this RFP. Please advise via email by **February 6, 2012.**

8.0 Inquiries and Questions

Inquiries are welcomed up to and including **January 31, 2012.** Inquiries should be made to Stephanie Hessel as identified above. Inquiries must be sent by email. Responses will be shared with all bidders at www.ohto.ca and will be posted by **February 3, 2012** by close of day.

9.0 Selection Process

9.1 Mandatory Requirements

The following criteria are mandatory and considered to be prerequisites for prospective submitting Consultants intending to respond to this RFP:

- The submitting vendor must be willing to sign a contractual agreement with the OHTO.
- The submitting vendor must be willing and capable of meeting time parameters.
- The submitting vendor must be willing to provide reports as requested.
- All items under 5.0 Proposal Requirements and 6.0 Submission Requirements have been met.
- The absence of potential conflict of interest on the part of the submitting vendor and as determined solely by the OHTO.

9.2 Selection Criteria

Proposals meeting all of the mandatory criteria will be further assessed against the following evaluation/ranking system:

- 1. Comprehension of Project (Weight 15%)**
Understanding of the project requirements demonstrated in the proposal and assessment of the viability of the proposed approach to the project.
- 2. Project Plan (Weight 20%)**
Quality and adequacy of proposed project plan (design, development and facilitation of information sessions). Creative and innovative approaches to the project.
- 3. Relevant Experience & Qualifications (Weight 50%)**
Previous experience, including references, managing a similar project (similarity in scope and complexity).
- 4. Total Cost (Weight 15%)**
Total cost for the project and added value.

Respondents may be invited to interview for this contract if deemed appropriate.

9.3 Key Dates

January 23, 2012 – RFP distributed
January 31, 2012 (NOON) – Submission of questions on the RFP
February 3, 2012 – Response to questions posted on website
February 6, 2012 – Indication of intent to bid by Vendor
February 10, 2012 (4:00 PM) – Deadline for receipt of submissions
February 17, 2012 – Proposals reviewed and interviews conducted if necessary
February 22, 2012 – Contract awarded
February 27, 2012 – Meeting with successful vendor, contract begins
March 23, 2012 – Final program approved
March 31, 2012 – Contract completion
TBD – Delivery of facilitated info sessions

10.0 General Terms and Conditions

A) Acceptance of Proposals

This RFP neither expresses nor implies any obligation on the part of the OHTO to enter into a contract with any respondent.

B) Rejection of Proposals

The OHTO reserves the right to reject any or all proposals for failure to fully satisfy the selection team that the specifications and the requirements for the RFP have been adequately met. Any award resulting from this RFP is subject to the successful completion of a contract between the Consultant and the OHTO.

C) Right to Amend

The OHTO reserves the right to amend or supplement the RFP, giving equal opportunities to all consultants who have been invited to bid, by way of an issued addendum.

D) Acceptance or Non-Acceptance of Proposal

Neither the lowest priced nor any proposal shall necessarily be accepted, and the decision of the OHTO is final. If the OHTO decides to accept a proposal, then this acceptance and the making of an award will be in writing and only in writing. Unless and until such written notification has been given, there is no successful consultant and no award has been made.

E) Associated Costs

There will be no payment to consultants for the work related to and material supplied in the preparation of responses to this RFP.

F) Information

All information collected in report or digital form by the consultant shall be then provided to the OHTO, and will become the sole property of the OHTO.

G) Previous Communications

This RFP document contains the entire requirements relating to this RFP. Other information or documentation provided to a prospective consultant or obtained by a prospective consultant prior to the release of this RFP or any other time shall not have any force or effect.

H) Conflict of Interest

It is the consultant's responsibility to ensure that no perceived or real conflict of interest exists for any of the company's personnel involved in the project.

I) Cancellation of RFP

Due to unanticipated expenditure constraints, this RFP may be cancelled at any time without liability by the OHTO to prospective consultants or to any other entity.

J) Authorization

To be considered a valid response, a consultant's submission must be completed and signed by an authorized company official.

K) Irrevocable

Bid submissions will be irrevocable for a period of sixty (60) days from the closing date.

L) Canadian Funds

Prices are to be provided in Canadian funds.

M) Liability and Insurance

The successful Consultant shall secure and maintain during the terms of the Agreement the following:

- Comprehensive general liability insurance on an occurrence basis for an amount not less than Two Million (\$2,000,000) Dollars.
- Automobile Liability Insurance for an amount not less than Two Million (\$2,000,000) Dollars.
- Professional Liability – A Professional Liability Insurance Policy, in an amount not less than One Million Dollars (\$1,000,000).
- Errors and Omissions Liability Insurance: The Successful Respondent Errors and Omissions Liability Insurance, in the amount not less than One Million Dollars (\$1,000,000).
- Other Insurance – Any other type, (including special and specific project professional liability insurance) form or as otherwise may be required from time to time.

The OHTO, its employees, agents, and consultants expressly disclaim any and all liability for representations, warranties expressed or implied or contained in, or for omissions from this RFP package or any written or oral information transmitted or made available at any time to a bidder by or on behalf of the OHTO. Nothing in this RFP is intended to relieve bidders from forming their own opinions and conclusions in respect to this RFP.