



Brand Audit and Refresh

Request for Proposals

May 2024

Ref 01-05-24 BR

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**REQUEST FOR PROPOSAL-
Notice to Prospective Consultants**

May 1, 2024

You are invited to review and respond to this Request for Proposal (RFP), providing services related to the development and implementation of a ***brand audit and refresh for the Community Business Development Corporations of Atlantic Canada***. In submitting your proposal, you must comply with these instructions.

Please note that no verbal information given will be binding unless such information is issued in writing as an official addendum.

In the opinion of the Atlantic Association of Community Business Development Corporations, this RFP is complete and without the need for explanation. However, if you have questions, or should you need any clarifying information, the contact person for this RFP is:

Helen Michel
(Atlantic Association of Community Business Development Corporations)
902-747-2232 (Office)
helen.michel@cbdc.ca

Please note we require all responses to this RFP to be based on fixed-priced quotes, no estimated quotes will be considered.



Table of Contents

1.0	Introduction	4
2.0	Contracting Agency	4
3.0	Background	4
3.1	Engagement Overview	5
4.0	Project Objectives	5
5.0	Scope of Work	6
6.0	Deliverables and Milestones	6
7.0	Proposal Structure	7
	Table 1: Response Structure	7
8.0	Project Schedule	7
9.0	Submission of Proposal and Vendor Information	7
10.0	Proposal Evaluation	8
	Table 2: Selection Criteria	8
11.0	Language of Proposal Submission	9
12.0	Awarding of Contract	9
13.0	Contact	9
14.0	General Conditions	9
15.0	Intellectual Property and Disclosure	10

1.0 Introduction

The Atlantic Association of Community Business Development Corporations (AACBDC) invites interested firm(s)/consultant(s) to respond to this Request for Proposal (RFP) to conduct a comprehensive brand audit and refresh of the Community Business Development Corporations (CBDC) brand. The consultant's findings and final report will be used to formulate a recommended approach for the refresh of the CBDC brand moving forward.

2.0 Contracting Agency

For this contract, the AACBDC will be the contracting agency.

The AACBDC is engaged in community-based business development through a network of autonomous, not-for-profit organizations that work with all levels of government and the private sector to meet the needs of small and medium enterprises.

In Atlantic Canada, there are 41 corporations dedicated to assisting small and medium enterprises including start-up, expansion, modernization, and maintenance of business entities in all sectors of the economy.

The AACBDC administers, on behalf of its 41 member CBDCs, several programs and initiatives. AACBDC is governed by a volunteer Board of Directors that is selected by each of the Atlantic provinces to provide oversight and governance of the affairs of the organization.

3.0 Background

The Atlantic Association of CBDCs carries out Atlantic-wide marketing initiatives through the Atlantic Communications Committee. The committee which began in 1997, has representation from each of the four Atlantic Provinces, ACOA, and staff from the Atlantic Association of CBDCs and is responsible for developing and executing a marketing strategy on an annual basis. The marketing strategies include items such as an annual report, coordinated ad campaign, management of social media, and responsibility for the ongoing maintenance and enhancements to the website www.cbdc.ca.

Last year as part of the 2023 Annual General Meeting and Conference a decision was made to stick with the CBDC brand, but an audit of the brand would be performed and as a result make recommendations on how to improve and modernize the CBDC brand.

3.1 Engagement Oversight

The AACBDC has appointed Helen Michel to liaise with the consultant for ongoing information and project management requirements. For the length of this engagement, the consultant will report to Helen Michel on the project deliverables and objectives.

Additional oversight may be provided by the Atlantic Communications Committee, which is comprised of:

- One representative from each of the four Atlantic provinces.
- Two ex-Officio representatives from the Atlantic Canada Opportunities Agency (ACOA).
- One representative from the AACBDC.

4.0 Project Objectives

The Atlantic Association of CBDCs is seeking proposals from qualified consultants to provide professional services related to conducting a comprehensive brand audit and as a result, make recommendations on how to improve and modernize the CBDC brand. The consultant's findings and final report will be used to formulate a recommended approach for the refresh of the CBDC brand moving forward.

The selected consultant will work closely with the AACBDC staff to achieve the following objectives:

- **Brand audit:** Conduct a thorough assessment of the CBDC brand and marketing assets and propose potential rebranding strategies to enhance its visual appeal, user experience, and overall effectiveness.
- **Final Report:** The consultant's findings and the final report will be used to formulate a recommended approach for the refresh of the CBDC brand moving forward.
- **Content Marketing:** Develop a comprehensive content marketing strategy that will outline detailed marketing initiatives and tactics that be utilized by staff to implement the recommendation cited in the final report that will refresh and modernize the CBDC brand. Those can include but are not limited to initiatives such as social media, website, digital, signage, print, etc.

5.0 Scope of Work

The scope of work for the consultant shall include, but not be limited to, the following:

- **Initial Assessment:**
 - Conduct a kick-off meeting with the Atlantic Communications Committee to understand the goals, target audiences, and unique selling points.
 - Review existing program materials, website, and relevant documentation to gain insights into the CBDC brand and its current positioning.
- **CBDC Brand Audit:**
 - Evaluate the current CBDC brand and current marketing assets including but not limited to the website, print and digital ads, and social media for its design, content, and overall user experience.
 - Identify potential areas of improvement and propose a rebranding strategy that aligns with the vision and objectives.
- **Project Presentation:**
 - Deliver a final presentation to the Atlantic Communications Committee, showcasing the proposed rebranding strategy and implementation plan.
- **Brand Refresh Implementation:**
 - Once the final report and recommendations are approved by the Atlantic Communications Committee, an implementation plan will be formulated regarding the branding audit findings and refresh recommendations. Please note that the implementation of the findings and recommendations is not part of the scope of this project.

6.0 Deliverables and Milestones

The following chart provides a breakdown of the key project milestones throughout the engagement.

Project Kick-Off and Discovery	June 2024
Engagement of Consultant	June 2024
CBDC Brand Audit and Refresh	June 2024 - December 2024
Initial Assessment	June 2024
CBDC Brand Audit	June – July 2024
Final Report and Presentation	August 2024
Brand Refresh Implementation	September – December 2024

7.0 Proposal Structure

Table 1: Response Structure	
Introduction	This section should briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
Understanding the issue	This section should explain the Consultant's understanding and interpretation of the objectives and requirements of this project. The successful Consultant will have demonstrated a good understanding of the work to be undertaken.
Work plan and methodology	This section should include the consultant's work plan, methodology, and understanding of the objectives and tasks outlined in section 4.0.
Summary of qualifications and experience	<p>This section must include:</p> <ul style="list-style-type: none"> • A brief résumé of the qualifications and experience of the consulting firm as they relate to this RFP. • A list of key project personnel to be used in the project outlining their roles and responsibilities. • (If applicable) a list of any subcontractors (individual or organization) that the Consultant intends to use when providing services under this RFP. • Corporate profiles and short-form résumés of key project personnel, as well as references for related work to be included as an appendix. Provide two reference projects where the company has undertaken work of similar scope and scale.
Pricing	<p>Pricing is to be detailed in a table and should include:</p> <ul style="list-style-type: none"> • All professional fees. • Travel costs (if applicable) for face-to-face meetings. • Other costs.

8.0 Project Schedule

The project schedule should assume an approximate starting date of June 12th, 2024. The term of the contract is anticipated to be up to and including December 31st, 2024.

9.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 pm on May 21st, 2024.

- Proposals should not exceed twenty (20) pages, excluding appendices. Appendices are acceptable as outlined prior.

- The successful proponent will be contacted within 14 business days of the RFP closing.
- Please submit an electronic version of the proposal in Word and Adobe Portable Document Format (PDF) to the following email address: helen.michel@cbdc.ca.

10.0 Proposal Evaluation

The AACBDCs will evaluate the proposals. The lowest-priced proposal may not necessarily be accepted. The AACBDC reserves the right to recommend rejection of all proposals and either cancel or re-issue the RFP if necessary.

The qualifications, commitment, related experience, and knowledge of the project personnel will be key evaluation factors. The experience of the consulting team in undertaking assignments of this nature and magnitude will be a significant factor in proposal selection. The evaluation framework outlined in Table 2 will be used in the selection with special attention given to the methodology, the project management, and the delivery plan.

The Evaluation criteria used to evaluate proposals fall into the following categories as referenced in Section 7:

	Factor	Scoring
1.	Consultant experience demonstrates the ability to provide requested services	15
2.	Consultant demonstrates an understanding of the project, its objectives, and metrics for evaluation	20
3.	Completeness and suitability of approach (proposed methodology)	15
4.	Capacity (identification of resources to undertake the project as well as relevant skills and experience by the individual)	15
5.	Pricing	25
6.	The consultant is from Atlantic Canada	10
	Total	100

Please note: we may choose to interview a shortlist of consultants as part of the evaluation process.

11.0 Language of Proposal Submission

Language of Proposal Submission Respondents are encouraged to submit their proposals in either French or English, based on their preference. Both languages are accepted for the submission of proposals. The evaluation process will ensure equal consideration and understanding of proposals regardless of the language chosen for submission.

12.0 Awarding of Contract

The resulting contract will contain such reasonable terms as the AACBDC may require.

The awarding of the contract will be made by the AACBDC, based upon the results of the evaluation of submitted proposals. The AACBDC will notify the successful Consultant in writing via electronic means. Those who are not successful will receive a written notification via electronic correspondence as soon as possible once the award of the contract has been accepted and the negotiations have been concluded with the successful Consultant.

13.0 Contact

All inquiries and requests for clarification must be submitted via email. Requests for clarification should be directed to helen.michel@cbdc.ca.

The AACBDC will administer the contract for this project. Contact for this RFP is:

Name: Helen Michel
Organization: Atlantic Association of CBDCs
Address: 459 Murray Street, Mulgrave, NS B0E 2G0
Email: helen.michel@cbdc.ca
Telephone: (902) 747-2232 Ext 202

14.0 General Conditions

Verbal information or representations shall not be binding on the AACBDC. Only changes, alterations, modifications, or clarifications approved in writing will be binding. To be valid all such changes, alterations, modifications, or clarifications shall be issued in the form of addenda and all such addenda shall become a part of this RFP.

The proposal of the successful Consultant will form part of any resultant contract agreement by attachment and incorporation by reference. Claims made in the proposal will constitute contractual commitments. Any provision in the proposal may be included in the resultant contract as a direct provision thereof. The successful Consultant, as a condition of submitting its proposal, accepts a customized contract that will be negotiated.

Any resultant contract from this RFP will be governed by the laws of the Province of Nova Scotia and shall be issued in the name of the successful Consultant exactly as that successful Consultant's personal or corporate name is stated in the RFP response document. Funds payable

for materials delivered under any resultant contract shall be paid only to the Consultant who is so listed as a party to any resultant contract. Only legally registered names of Proponents are acceptable.

The proposal will contain the signature, name, and title of the person authorized to sign on behalf of the Consultant on the proposal submitted in response to this RFP.

The responsibility rests with the Consultant to submit a complete proposal, with proper and adequate detail to substantiate all aspects of its proposal. Incomplete proposals shall be deemed to be non-compliant. A complete proposal should include but not be limited to:

- Legal name and status: The proposal shall state the correct legal name and legal status of the proposing entity and the correct mailing address.
- Consultant contact: The name, title, telephone and fax numbers, e-mail address and civic address of a representative who may be contacted for clarification or other matters relating to the proposal shall be provided.
- Content: The proposal will be clear, and concise, and must include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal shall not simply rephrase or restate the requirements but rather shall provide a convincing rationale to demonstrate how the Consultant intends to meet these requirements.

The successful Consultant must be licensed to conduct business in its jurisdiction and may be required to produce a certificate of good standing for that jurisdiction.

All terms and conditions will apply to all subcontractors and the Consultant will be responsible for subcontractors' compliance. The Consultant will be responsible for all work done by the subcontractors. The Consultant will be responsible for all damages and will complete any work unfinished by the subcontractors.

The following constitutes the release of payment by the AACBDC for this engagement:

1. 10% released upon signing of the contract.
2. 40% released upon completion of the brand audit.
3. 50% released upon successful completion of the entire project scope of work as outlined in section 5.0.

15.0 Intellectual Property and Disclosure

All proposals and any intellectual property that is developed as a result of this project, including all data, specifications, concept plans, designs, rationales, presentation materials, economic and technical reports, and related information produced by the Consultant in completing this work submitted shall become the property of the AACBDC. By submitting a proposal, the Consultant hereby grants the AACBDC a license to distribute, copy, print, or translate the proposal for the invitation and completion of the project, including to the members and representatives of ACOA.

All documents submitted by partner agencies shall remain the property of the issuing organization. All information is proprietary and as such shall be treated as confidential. Information obtained by the Consultant as a result of participation in this project is confidential and must not be disclosed without written authorization.