

# **CENTRAL ALBERTA TOURISM ALLIANCE**

## **Request for Proposals:**

### **Central Alberta Regional Economic Impact Assessment of Tourism**

Issued on: 2024-05-06

Proposals due by: 2024-06-09 at 4pm MST

#### **Send proposals to:**

Central Alberta Tourism Alliance

c/o Town of Sylvan Lake

[nbhola@sylvanlake.ca](mailto:nbhola@sylvanlake.ca)

## **INVITATION TO SUBMIT PROPOSALS**

The Central Alberta Tourism Alliance (CATA) regional group of communities is interested in assessing the economic impact of tourism across the Central Alberta region including Red Deer, Red Deer County, Sylvan Lake, Lacombe County, Innisfail, Blackfalds, Rocky Mountain House, and Clearwater County.

CATA is seeking proposals with a quote from firms with the background and experience required to carry out the work as described in this RFP. The successful proponent will gather visitor data including volume of visitors and visitor expenditure data and perform economic impact modelling to provide a clear picture of the impact of visitation in each of the identified geographic areas as shown in Schedule A.

Proposals marked "**Regional Economic Impact Assessment of Tourism**" shall be received at the following address to the attention of:

Central Alberta Tourism Alliance  
c/o Town of Sylvan Lake  
[Nbhola@sylvanlake.ca](mailto:Nbhola@sylvanlake.ca)

Completed proposals must be received no later than **June 9, 2024 at 4pm MST**. Late proposals will not be accepted.

**An electronically transmitted PDF document will be accepted as your proposal submission.** To ensure that your proposal has been submitted on time, Microsoft Outlook users are encouraged to flag the email transmission with a "Request a Delivery Receipt" under the Options menu.

## **PROJECT BACKGROUND**

CATA is a regional group formed by the mutual agreement and contribution of communities throughout Central Alberta to further tourism development goals in the area. Representatives are typically economic development or tourism staff from the municipality or tourism board for each community.

For the purposes of this project, the Central Alberta region will encompass the geographic area as outlined in Schedule A. Data for specific cities/towns within a county must be assessed separately from the remaining county as identified.

The information in this project will be used by municipalities and tourism organizations to quantify and communicate the importance, economic value, and economic contributions of tourism to funders, investors, all levels of government, residents, and local business for the region as a whole and to each community individually.

## **PROJECT DESCRIPTION**

CATA is seeking a qualified and experienced firm to conduct a quantitative research analysis of current and relevant visitor statistics.

The successful proponent will measure statistics and create an economic impact analysis for each individual geographic area as described in Schedule A.

Data compiled by the firm will form the basis of economic analysis and modelling to determine the economic impact of tourism on each community as well as the contributions to the regional and provincial economy.

Proponents will identify research data sources in their proposals along with a description of their relevance. Sources may include mobile data (device-based gps or cell tower), primary research sources as identified, secondary research sources as identified, and other statistical data available from provincial or federal government sources or Travel Alberta.

The firm will compile the following statistics for each geographic area as described in Schedule A:

- Total number of visitors
- Number of same-day visits
- Number of overnight visits

Proposals should include a discussion of the research methodology and timeline to gather the following types of expenditures:

- Camping/campsites
- Other commercial accommodation
- Meals and refreshments
- Grocery and liquor store purchases
- Retail stores/shopping
- Recreation and entertainment
- Gas and oil
- Car/vehicle rental
- Public transportation
- Other goods or services in Alberta
- In addition, the proposal should imply and recommend other data that will be captured through the surveying process.

## **SCOPE OF WORK**

The scope of work required of the chosen Proponent will include but will not be limited to the following:

1. Data collection from reliable sources. These source should be replicable in the long term for data consistency in future years.
2. Attend a project start-up meeting with the CATA group to review the proposed data collection methodology, resolve logistical issues, and identify any conflicting activities that may impede process.
  - a. Issues that need to be resolved prior to data collection include, but are not limited to: the type of information that is available to the vendor (i.e. previously gathered data and statistics and studies), questions that CATA would like to include on the survey, time of day and days during which interviews may and may not be conducted and other data collection logistics as identified.
3. If any in-person visits are required, the proponent should be prepared to visit each community alongside the CATA representative for that community
4. Conduct primary research as designed to capture the volume and expenditures of visitors and other pertinent information such as length of stay, place of residence, and standard demographics. Any survey-based research is subject to final approval by the CATA group.
5. Where applicable, proposals should include a sampling plan, an estimated number of respondents, details on the training to be received by the interviewers, a final schedule of deliverables, a draft questionnaire, and corporate information, such as recent experience with related surveys, and past experience with providing expenditure data for the economic impact modeling. In addition, the proposal should identify the project team members and their related experience.
6. Develop a detailed sampling plan, including a stint schedule for the site surveys. The rationale for the sampling plan must be provided. The vendor must also provide a recommendation for the total number of interviews to be completed and the rationale for that recommendation.
7. The proponent's staff must look professional when conducting site surveys, evidenced by an identifying uniform and name badge to be worn by field staff.
8. The expenditure data collected by the surveys must be consistent with the data entry requirements for economic impact modeling.
9. A PowerPoint presentation of the results of the questions included at the request of the project team will be delivered as a delegation to CATA at a date mutually agreed to by the proponent.
10. Weighted data must be provided, including (but not limited to) expenditure data; for

example, the estimated number of visitors during the third quarter of 2023. Proponents are to provide a preliminary list of questions to be included in the on-site survey as part of their submission, as well as the Table of Contents for the interviewer manual. In addition, the proponent should outline how the training of interviewers will be accomplished, how many interviewers in total will be trained and how many will be present at each stint.

11. The report (and the economic impacts) must be prepared using weighted data. A final report that details the methodology used to gather the expenditure data and a description of the sampling plan, including the rationale for the plan must be included. Weighted expenditure data must also be provided, including a detailed explanation of the weight(s) used, linking the weight(s) directly to visitor data provided by CATA. In addition, an appendix must be included in the report that highlights what worked well with the interviews and what did not work well, with recommendations for improvements. The intent of the appendix is to serve as a learning tool for future surveys of this nature. The data must be provided per municipality, as per Schedule A.



## **PROJECT SCHEDULE**

Proponents should submit a detailed expected schedule with their proposal. It is anticipated that work be completed to the satisfaction of CATA within the 2024 calendar year.

## **PROJECT BUDGET**

Proponents should submit a detailed project budget including all costs for labour hours, travel expenses as needed, and tools for software or database access as needed.

## **RFP PROCESS**

The objective of this RFP is to secure reliable data collection of visitor statistics and any relevant economic modelling necessary to determine the economic contributions of visitors to the Central Alberta area communities.

CATA will have specific interest in those Proposals from individuals and firms that demonstrate a strong research-basis to their work and are capable of managing, leading and implementing the Project.

Companies that provide unique and insightful perspectives and who possess the abilities and resources to carry through the project components in a timely manner will be considered.

Through the RFP process it is anticipated that the Proponent will have demonstrated knowledge, skills, abilities, and resources in a number of areas including:

1. A proven track record that demonstrates the required skills and abilities necessary to see the project through to completion,
2. Knowledge and experience with data collection, analysis, and economic modelling,
3. Creativity and demonstrated ability to lead the project.

In addition, "*fees for service*" will play an integral role in the selection process. This selection process is not a tendering process. The submission of a Proposal does not constitute a legally binding agreement between the CATA and any proponent. CATA will engage in a "Contractual Agreement" with the successful proponent upon formal acceptance of the CATA group.

CATA reserves the right to reject any or all proposals. Should the initial chosen proposal fail to be endorsed for any reason, CATA reserves the right to consider alternate proposals as received through the initial RFP process.





## **PROPOSAL REQUIREMENTS**

In order for the selection committee to make a proper assessment of each Proponent, the following information should be included in the Proposal:

1. Executive Summary should touch on the pertinent points in the Proposal you wish to highlight, including an overview of the project schedule and costs.
2. List of similar projects undertaken by the Proponent, either in progress or completed in this field, and the outcome of these projects, including project year.
3. List of the key project personnel (including resumes and key project experience) for both staff in-house and sub-consultants who will be contributing to the project.
4. Include the legal name of the Proposer(s) and the signature of the person(s) legally authorized to bind the Proposer(s) contract. The Proposal shall also include the name, mailing address, phone number and email address of the person that CATA can contact regarding questions about the Proposal.
5. Intended approach, data sources, and research methodology will be described in detail as well as a justification for use of those sources.
6. Describe your approach to performing the contracted work. This should include but is not limited to the following:
  - a. Type of services provided
  - b. Plans for involving and educating CATA with regards to the process
  - c. An outline of major tasks and responsibilities assigned to staff (labour, financial, etc.)
7. Detailed Fee Schedule and Total Proposed Amount of project.
8. Detailed Project Schedule that indicates major milestones including mobilization and time between contract award and set up.
9. A minimum of three reference contacts for the Lead Consultant and each of any sub-consultants.

## **EVALUATION CRITERIA**

Each Proposal will be evaluated on the basis of the criteria listed below and CATA will have the sole and unfettered discretion to award up to the maximum number of points for each criteria listed below.

By submitting a Proposal, the Proponent acknowledges and agrees that CATA has, and it is hereby entitled to exercise, the sole and unfettered discretion to award the points for the evaluation of the noted categories.

By submitting its Proposal, each Proponent acknowledges and agrees that it waives any right to contest in any legal proceedings the decision of CATA to award points in respect of the categories noted below. The categories and the maximum number of points for each category are as follows:

Eligibility (10):

- 1) Demonstrated understanding of the project and identified requirements;
- 2) Full and comprehensive project approach and methodology, including sound and reliable research methodology and data sources clearly identified;
- 3) work plan tactics to achieve deliverables, including timeline and budget. Proposal must have a staggered set of tactics dedicated to collecting data within the set timeline;
- 4) Value for dollars:
  - Must indicate both time and cost for each element of project and broken down by firm-cost of services and products to be provided;
  - total Proposal amount;
  - expectations of CATA (labour and financial) are clearly outlined.
- 5) Qualifications:
  - Proposal contains resumes for each individual involved;
  - Proposal contains evidence of financial ability of proponent to perform work;
  - Proponent demonstrates prior experience with data collection and economic modelling;
  - Proponent's team members and their prior experience tourism related data collection
  - Legal name, address, etc. of proponent;
  - References

## **REQUEST FOR INFORMATION**

Proponents are solely responsible for ensuring that all information necessary to prepare its proposal is acquired and for independently verifying and informing itself with respect to any requirements, terms and conditions. All enquiries related to the RFP shall be directed to:

Central Alberta Tourism Alliance  
c/o Town of Sylvan Lake  
Nbhola@sylvanlake.ca

Inquiries regarding the RFP can be directed to the contact person above electronically via email prior to **June 9, 2024 at 4pm MST**.

## **COMPLETE PROPOSALS**

The requirements that each Proponent must follow and include in its Proposal are outlined herein. CATA reserves the right to determine, at its sole discretion, whether any proposal meets the mandatory requirements. Proposals shall address all of the requirements as outlined in this Request for Proposals (RFP).

## **ACCEPTANCE AND REJECTION OF PROPOSALS**

CATA reserves the right to accept or reject any and all Proposals including the right to not necessarily accept the lowest proposal, and the right to not accept any Proposal that CATA considers, in its sole and unfettered discretion, whether any Proposal meets the mandatory requirements of this RFP.

CATA reserves the right to waive, in its sole and unfettered discretion, any formality, informality or technicality in any proposal whether of a minor and inconsequential nature or whether of a substantial or material nature. CATA reserves the right to negotiate with any Proponent that has submitted a proposal that does not fully comply, in either material or non-material way with the mandatory requirements of this RFP or any requirements contained within their RFP.

CATA reserves the right, in its sole and unfettered discretion, to accept any Proposal without stating reasons. By submitting its Proposal, the Proponent waives any right to contest in any legal proceeding or action the right of the CATA and any of its members to negotiate with any Proponent and to award the work to whomever CATA deems, in its sole and unfettered discretion, to have submitted the Proposal most beneficial to the CATA group.

## **SCHEDULE A**

The following geographic areas are to be studied together as a region and separately as communities:

1. Town of Blackfalds, municipal limits
2. Town of Rocky Mountain House, municipal limits
3. Town of Innisfail, municipal limits
4. Red Deer County municipal limits
5. City of Red Deer, municipal limits
6. County of Lacombe, municipal limits
7. Town of Sylvan Lake, municipal limits
8. Clearwater County, municipal limits