

LEADERSHIP NIAGARA

REQUEST FOR PROPOSAL

Leadership Niagara

**Intends to Select a Firm to assist in reinventing its
Sponsorship and Partnership Program & redesign the
Website**

**CLOSING DATE:
3:00 P.M. November 10th 2023.**

LEADERSHIP NIAGARA

SECTION 1 - INVITATION TO PROPONENTS

This Request for Proposal ("RFP") is an invitation to qualified, professional businesses (the "Proponent") to submit Proposals for Business Services for the delivery of a Partnership and Sponsorship Program and Website ("Services"), to support Leadership Niagara (the "Purchaser") as further described in Section 3 – Scope of Work.

Proponent proposals will provide for complete delivery, coordination, administration, and supervision of the Project(s).

The Preferred Proponent shall be required to enter into an Agreement ("Agreement") substantially in the form of a Contract for the provision of the Deliverables as described in section 7.0.

The Purchaser intends to award Agreement to only one (1) Proponent. The Agreement will be signed in December 2023 and no obligation on the part of the Purchaser to purchase Services shall arise until such time as the Agreement is signed.

SECTION 2 - PURPOSE AND CONTENT

Leadership Niagara invites qualified suppliers to submit proposals for the selection of a website design firm to re-design the organizations website and create a Sponsorship and Partnership Program for the association.

This document consists of:

- Section 1 – Invitation to Proponents
- Section 2 – Purpose and Content
- Section 3 – The Brand Context
- Section 4 – The Project
- Section 5 – Leadership Niagara Sponsorship Packages
- Section 6 – Website Requirements
- Section 7 – General Requirement
- Section 8 – Instructions to Proponents
- Section 9 – Evaluation and Award
- Section 10 – Award Contract
- Section 11 – Deliverables and Timeline

SECTION 3 – THE BRAND CONTEXT

Mission Statement

Leadership Niagara's mission is to contribute to the building of a stronger, healthier, more vibrant Niagara by providing community leadership training experiences that will help prepare leaders who have the vision, energy, skills and broad community perspective to facilitate individual and community growth. Leadership Niagara is an exciting, continuously evolving program for aspiring

LEADERSHIP NIAGARA

leaders in the private, public and voluntary sectors. Participants will develop an in-depth, comprehensive understanding of their community, as well as an opportunity for individual learning, growth and leadership development. The program is a community owned initiative dedicated to building organizational and community capacity.

Background

Leadership Niagara is entering its 17th year of operation built on a model used in many medium to large cities throughout North America. The key components are as follows.

Opening Retreat

During this retreat, participants will explore their personal leadership styles and gain an understanding of the concept of community leadership. They will be introduced to the power of leveraging the collective strengths and collaboration in teams.

Learning Days

Participants will meet for seven full Learning Days, one day each month, beginning in October. Learning Days involve a combination of guest speakers and hands-on activities that offer the opportunity to enhance participants' core leadership competencies. Faculties have included professors from Brock University, Niagara College and established business people from the Niagara Region.

Community Projects

Working in teams, participants will engage in a partnership with a Niagara-based organization. Together they will tackle a project that responds to a challenge currently facing the community partner, and that exercises the skills learned in the program.

Closing Retreat

This closing session provides the opportunity for the teams to present their community projects and share the learning, actions and insights gained through the program.

Class size will be between 30 to 40, approximately.

Brand Positioning

Leadership Niagara Brand Positioning – For Employers and Sponsors

LEADERSHIP NIAGARA

For organizations and promising individuals interested in building a stronger Niagara, Leadership Niagara is the only training opportunity in the region that combines outstanding leadership skills and community development in one program.

Leadership Niagara Brand Positioning – For Participants

Leadership Niagara provides experiential leadership development, challenges people to effect positive change in their community, and fosters connections with active and emerging leaders in the Region.

With regards to the Leadership Niagara design/brand standard, the respondent will assist in refining and adhering to Leadership Niagara's current colour palettes, its logo's and ensuring that the organizations website and all designs with respect to this RFP align to its standards.

SECTION 4 – THE PROJECT

Leadership Niagara has received funding from the Community Services Recovery Fund for the development of Sponsorship and Partnership Program and creation of a new website that reflects an updated approach inclusive of partnership and sponsorship.

The project is alignment with the 5-year Strategic Plan recently launched (June 2023) by Leadership Niagara which speaks to the creation of new incentives that focus on ensuring accessibility to the program by embracing the ever-increasing diversity in the Region. The goal is to engage and collaborate with businesses and not for profit organizations to create purposeful, meaningful connections and achieve goals through sharing varied skill sets, strengths, and perspectives.

SECTION 5 – SPONSORSHIP PACKAGES

The issue: Leadership Niagara believes that relationships are central to the collective community approach taken by the organization. Selecting the right business and organizations to work with, collaborate with, and learn from, to position Leadership Niagara to thrive in advancing the concepts of community leadership.

Leadership Niagara is seeking a company to develop a sponsorship and partnership program that will support the goal of financial sustainability through the creation of sponsorship and partnerships programs that will enhance access and reduce costs for program participants.

Specifically

- Sponsorship Plan
- Partnership Strategy document
- Related staff training for implementation

LEADERSHIP NIAGARA

- Evaluation/Assessment Tool

Project Deliverables

The Sponsorship and partnership plan/campaigns will support the long-term sustainability of the organization by creating a more diverse group of partner and advocates. These elements will allow for a reduced cost-burden on participants, therefore expanding access to the program.

Sponsorship Program

- Review existing sponsorship package as it relates to Learning Days and sponsorship levels.
- Assess upcoming sponsorship needs
- Review Leadership Niagara's brand position
- Facilitate Competitor Research
- Define target audience
- Develop a clear strategy that includes social media platform and Website positioning
- Define new opportunities and Return on Investment for Learning Day sponsors
- Review the Key Performance Indicators of the Year End magazine and define advertising opportunities including pricing structure
- Create other forms of marketing and promotional opportunities for potential sponsors
- Determine pricing structure
- Define terms and conditions

Partnership Program

- Review current partnership and value proposition.
- Identify and define partnership opportunities and organizational alignments that will sustain funding for a minimum of two years.
- Create an engagement strategy that positions LN activities and their benefits to the region.
- Diversify LN sources of funding through partnership opportunities that contribute to operating costs.
- Investigate opportunities for diversification of programming and delivery through partnership development
- Review and revise DEIBR scholarship application and selection process
- Evaluate grant opportunities
- Review Memorandum of Understanding opportunities within the Niagara business and not for profit communities in an effort to expand partnerships and sponsorship opportunities.
- Determine pricing structure
- Define terms and conditions

SECTION 6 - WEBSITE & REQUIREMENTS

LEADERSHIP NIAGARA

The issue: the current Wordpress website is currently cumbersome, broken in several areas with plugins that either are not setup correctly, do not work, or require a license.

Target Audiences

- Potential Participants
- Employers – who may identify and send participants
- Current/future sponsors
- The community at Large
- Volunteers

Purpose of website is to provide:

- Organization overview (About Us)
 - Organization overview (organization founding, mission statement, vision etc)
 - Board of Directors info and CV's
 - Faculty information and CVs
 - List of Partnerships
 - List of Current Sponsors
- Program(s) information
 - Program Overview
 - Program Benefits – for participants and their employers
 - Learning Outcomes
 - Financial Assistance (bursaries & scholarships)
 - Sponsorship (Overview of how to sponsor the program specifically vs the Organization as a whole and then link to "Ways to Support Leadership Niagara)
 - Program Schedule and Dates
 - Enrolment Options / Application process (link to downloadable PDF / customizable online application form)
- Testimonials
- Ways to support Leadership Niagara
 - Sponsorship Packages
 - Benevity
 - Many Hands
 - Donations
 - Volunteering
- Direct Contact
 - Contact form with Captcha
- Ways to interact with Leadership Niagara outside of the program(s)
 - Surveys
 - Social Media
 - Events
 - Chamber of Commerce
- Participants Only Section (schedule, roster, updates, etc.)
 - Alumni listing etc. (see leadershipniagara.ca)
 - Considering a Leadership Niagara LMS (Learning Management System)

LEADERSHIP NIAGARA

- Currently out of scope for this RFP, but to be kept in mind during development, suggestions may be provided
- Recent/Site News from the Organization
 - With top X articles appearing on the main page
 - And link to all news items
- Blog/Articles – does not need to be an actual blog, but a way for Directors or Faculty/Staff to write articles and have them posted on our website
 - Articles to highlight author at the bottom of each article (about the author, which could link to their staff information page)
- Discussion around online payment options (pay online for course fees, and possible integration with the website or an LMS)
- Site Map

How we envision the look of the new website:

- Clean, clutter-proof, simple, logical
- Utilize lots of white space
- Very user-friendly, inviting
- Interactive
- Intuitive navigation
- Organic (connects and flows)
- NO flash page or heavy images (all images must be designed for web, not print (low file size images))
- Ensure you do NOT have to scroll down or right to left to see entire main page content (this leads to main page banner not covering the entire page)
- Header to contain logo/banners and navigational content
- Footer to contain additional web page navigation typical on corporate websites such as careers, volunteer positions, contact info, address, sitemap etc
- Primary content to be no more than 3 clicks away

First Level Navigation

- Main page – branding and rotating banner for recent news
- Instant buttons on main page for: about us, program(s) and information, application process (apply now), sponsor information, participants only, ask us
- Respondent to provide suggested design overview, navigational layout and flow of website in response
- Successful respondent will adhere to company brand guidelines and colour palettes that are discussed and agreed upon

Technical Requirements

- Technologies – should be built upon a friendly and easy to use interface for non-technical staff to make content changes (such as a CMS)
 - For each of the areas above where possible, we would like page templates to be created that offer fill in form functionality.

LEADERSHIP NIAGARA

- Example: Listing of staff, the user should be able to click add staff member, or remove staff member and add details using a form
- Example 2: For articles, the user should be able to click add new article and begin typing with the footer of the article having an "About the author section"
- Example 3: An ability to create a new custom form for surveys or signups to other programs
- The way the firm goes about implementing this sort of functionality is open to suggestion
- Responsive design (mobile friendly)
- Optional: A way to provide staff an easy to use upload/image attachment that converts the image in to a web ready version (from print resolution to web resolution and file size reduction)
- Must operate on a shared web hosting platform (LAMP stack or similar)
- Any website plugins or 3rd party software that is added to the website must be disclosed and an overview provided. Be sure to outline if any additional licensing required and its requirements/costs
- Respondent must provide technical requirements for the website and outline any caveats
- Upon completion of the website the following is to be provided
 - IT Technical Documentation/Walk through for Volunteer IT Admin
 - Including but not limited to, updating the website, maintaining any 3rd party plugins and licensing, etc
 - User guide on how to update the contents of the website for non-technical staff
- The respondent to adhere to a cyber-security mindset while building the website and to take precautions where possible; including but not limited to: custom code being double checked for possible issues/security flaws (ex: fields not being stripped for non standard characters, and protections for SQL injections)
 - Please provide captcha (human verification) for any public facing forms; please outline the details of the captcha being used
- Leadership Niagara is not interested in having the public be able to comment on any of the posts, articles or pages on its website through any built in comment sections etc. If using a CMS this functionality is to be disabled through Admin interfaces. There is no full time IT Administrator and this will reduce the amount of time managing the website
- SEO is to be considered when building the website, any plugins or configuration for such shall be added to documentation for IT Admin/End Users as appropriate
- Google Not for Profit Grants – Leadership Niagara is a recipient of the program and would like to effectively utilize it as best as possible
 - Google Analytics, Google Tag Manager and Google Ads are to be integrated into website
 - Required variables/parameters passed within the links supported to be able to track conversions with Google Ads
 - Provide overview documentation to IT Admin on how to maintain the above integrations

LEADERSHIP NIAGARA

Maintenance

We need the site to be designed in a manner that will allow it to be updated easily by Leadership Niagara personnel who are primarily non-technical in nature. Please note an IT Admin volunteer will be working with Executive staff to administer this RFP. Technical questions can be addressed.

Content of the website to be driven by Leadership Niagara.

A period no shorter than 3 months post website launch will be provided for maintenance and warranty coverage in the event of an issue or deficiency as agreed upon by both parties.

An optional yearly website maintenance package should be presented along with the RFP response outlining what's included in the package and the yearly cost. This package should have no change in price for a minimum of 3 years with an option to extend to 5.

SECTION 7 – GENERAL REQUIREMENTS

General requirements for Eligible Proposals include:

1. Fixed Contract

This is a fixed Contract. The budget has been pre-determined and will be managed by LN Staff.

Proponent Proposals are to be limited to the fee for their services. This includes staff hourly wages, software requirements, and other planning expenses. Proposals above \$15,000 will not be considered. Expenses are required to be itemized in the proposal.

2. Insurance

Throughout the term of the Contract (including any renewal thereof), the Successful Proponent shall obtain and maintain at its own expense, including the cost of any applicable deductible, the following policies of insurance:

Professional General Liability Insurance, including but not limited to bodily injury and personal injury liability, property damage, products liability, completed operations liability, owners & contractors' protective liability, blanket contractual liability, premises liability, broad form property damage, employer's liability and voluntary compensation and contingent employer's liability coverage, having an inclusive limit of not less than \$1,000,000.

3. Commitment to Ownership and Confidentiality of Intellectual Property

LEADERSHIP NIAGARA

All material provided by Leadership Niagara is to be kept confidential and secure until there is consent to its release by Leadership Niagara. All materials, concepts and digital files developed and produced for Leadership Niagara including copyright, become the property of Leadership Niagara on receipt of payment to the contractor.

4. Indemnity

The contractor agrees and undertakes to fully indemnify and hold Leadership Niagara and its shareholders, directors, officers and employees harmless from and against any claims, damages, losses, costs, liabilities and expenses (including legal fees and disbursements on a full indemnity basis) directly or indirectly caused to Leadership Niagara.

5. Warranty/Guarantee of the Successful Proponent

Each Proponent shall be deemed to have expressly warranted upon the submission of its Proposal as follows:

- i. The Proponent, if a corporation: is a duly incorporated, organized and subsisting corporation and has all requisite powers, capacities, authorities, permits, licenses and permissions under its governing legislation and any other Laws applicable to it, and under its Articles of Incorporation and by-Laws under which it is organized, to carry on all businesses in which the Successful Proponent is engaged; and enter into, exercise its rights and perform and comply with its responsibilities and obligations under the Contract Documents; and that all actions, conditions and things have been done, taken or fulfilled with respect thereto, that are required by Law, contract or otherwise; or
- ii. If other than a corporation: is duly registered as a business under all applicable legislation, and as such has all requisite powers, capacities, permits, licenses and permissions under its governing legislation and the other Laws applicable to it, to carry on all businesses in which the Successful Proponent is engaged; enter into, exercise its rights and perform and comply with its obligations under the Contract Documents; and that all actions, conditions and things have been done, taken or fulfilled with respect thereto, that are required by Law, contract or otherwise.
- iii. The Successful Proponent and its Sub-Consultants and the respective workforce of each are fully qualified to perform the Services and to perform the Contract and hold all requisite permits, licenses, franchises and other authorizations required by this RFP, and by Law, contract and otherwise with respect thereto.
- iv. The Successful Proponent is not a party to any Contract under the terms of which the Proponent is prohibited or restricted from entering into any of the obligations assumed, liabilities imposed, or restrictions accepted by the Proponent under the Contract Documents.

LEADERSHIP NIAGARA

- v. To the best of the Proponent's information and belief and after making diligent inquiries, the information concerning the business, affairs and financial and other condition of the Proponent that are contained in all documents, memoranda, records, statements made, sent or given by the Proponent to the Leadership Niagara prior to entering into the Contract, and in its current regulatory filings, are true and accurate in all material respects; and the Proponent is not aware of any material facts or circumstances having a bearing upon its ability to perform its obligations under the Contract which have not been disclosed to the Leadership Niagara in writing.
6. The Proponent shall forthwith advise Leadership Niagara in writing in the event it becomes aware of any material fact or circumstance which may arise, at any time, that may have a bearing upon its ability to perform or assume its obligation under the contract.

SECTION 8 - INSTRUCTIONS TO PROPONENT

Proposals for selection of a firm to redesign the Sponsorship Packages and Leadership Niagara website must be received no later than November 10, 2023 3:00 p.m. Eastern Standard Time. Proposals should be submitted by email to Terry Dow, Executive Director at the following address:

tdow@leadershipniagara.ca

Proposals received after the closing time and date shown will not be considered.

Proposal documents must be completed in accordance with the requirements of this Request for Proposals document and no amendment or change to proposals will be accepted after the closing date and time. Proposals including cost estimates provided shall be irrevocable for ninety (90) days following close of bidding and shall be retained by Leadership Niagara.

Questions regarding this Request for Proposals may be submitted **via email only** up to **the date outlined below** to the provided email address as shown above. To the extent that we believe the answer to a question posed by one bidder will be applicable to all bidders, we will communicate that answer(s) to all via email.

In the event the bidder cannot comply with any term, condition or requirement of this Request for Proposals, such non-compliance must be clearly noted under the bidder's letterhead and submitted with the proposal. Bidders are cautioned that such non-compliance may result in disqualification of the bidder's proposal, in the sole discretion of Leadership Niagara.

Leadership Niagara does not bind itself to accept the whole or any part of any proposal.

LEADERSHIP NIAGARA

All prices are to be quoted are in Canadian Funds with taxes extra.

SECTION 9 - EVALUATION AND AWARD

Leadership Niagara intends to award a contract to the bidder whose proposal offers the best approach and value. However, the organization is under no obligation to award any contract in whole or in part and reserves the right, in its sole discretion, to cancel this Request For Proposals process at any time before or after closing without providing reasons for such cancellation.

Basis of Selection

A project team has been established to oversee this project, produce and release this RFP and evaluate bidders' responses.

Selected bidder(s) may be scheduled for interviews/presentations to discuss proposals in more detail.

All proposals will be evaluated upon the following criteria but not necessarily restricted to:

Weight Factors

- 40%** A submission that defines your planned approach, scope of work, critical path, steps to be taken, and budget, including all costs. Particular attention will be paid to proposals' delivery against the above stated LN Brand Positioning and Website Requirements. Value adds should be noted.
- 40%** The bidder's relevant reputation, experience and qualifications in website development. The specific personnel who would actually fulfill the requirements of the proposal and the role of each individual. Please provide a CV including relevant experience for each individual on the team.
- 20%** Quality of thinking and clarity of presentation contained in the proposal, relevant approach and ability to meet the timeline.

In order to obtain the greatest overall quality for this initiative, Leadership Niagara reserves the right:

- To waive irregularities and/or minor non-compliance by any bidder with the requirements of this RFP
- To request clarification and/or further information from one or more bidders after closing without becoming obligated to offer the same opportunity to all bidders; and
- To enter into negotiations with one or more bidders without being obligated to negotiate with, or offer the same opportunity to all bidders.

LEADERSHIP NIAGARA

Leadership Niagara shall not be responsible for any expenses or charges incurred by a bidder in preparing or submitting a proposal nor in providing any additional information considered necessary by Leadership Niagara for evaluation of proposals.

The respondents are to submit along with the response to the RFP the companies insurance and liabilities coverage details including but not limited to the amount that the respondent is covered for.

SECTION 10 - AWARD CONTRACT

The successful bidder may sub contract portions of this RFP to other companies if the respondent cannot fulfill the RFP in its entirety. Example: Marketing firm providing sponsorship package creation sub-contracting the web site re-design. While this is permitted, it must be fully disclosed at the time of bid of who the company is and the 3rd party must meet all pre-stated requirements. The respondent is fully responsible for the sub-contractor fulfilling its obligation as part of this RFP.

Leadership Niagara and the successful bidder acknowledge and agree that they are independent contractors in a contract for goods and/or services and no employer/employee, partnership nor agency relationship is intended or created by their agreement.

Leadership Niagara shall have the right to terminate any contract formed with the successful bidder (if any) upon written notice to the successful bidder.

SECTION 11 – DELIVERABLES AND TIMELINE

Your RFP response should include:

- A brief description of your firm, years in business, current client list (min of 3 references), years working with each client, relevant experience and similar projects
- A description of the planned approach/scope of work designed to address the website redesign
- Names and credentials of firm principals and representatives who will work directly with us.
- A complete breakdown of estimated costs including initial presentation and revisions as necessary
- Provide at least three references for projects of a similar scope or magnitude for which your firm has provided similar services.

Payment Timetable

December 2023 - 25% plus HST
February 2, 2024 – 50% plus HST
May 1, 2024 – 25% plus HST

LEADERSHIP NIAGARA

February and May payments subject to change depending on progress made in website development.

Contract and Deliverable Timetable

Request for Proposal Issued	September 18 th , 2023
Last day for questions	November 3 rd , 2023
RFP Submission Deadline	November 10 th , 2023
Short listed vendors contacted	November 24 th 2023
Presentations by short listed vendors	Week of Dec 4 th 2023
Awarding of Contract	December 8 th , 2023
Major Milestone Check	February 1 st , 2024
Website launch	April 26 th , 2024
Final Sponsorship and Partnership Program	April 26 th , 2024
Maintenance/Warranty Period (min of 3 months)	July 26 th 2024

We look forward to your response, and thank you for your interest, effort and time in preparing your proposal.

This RFP will be evaluated by:

- **The Executive Director**
- **A member of the Board of Directors**
- **A member of the Program Advisory Committee who is an IT Professional**