



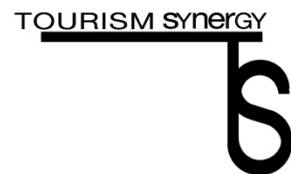
Northern Ontario Experiential Tourism Development Program

Proposal

August 25 2014



the Tourism Company



Contact Person: Jill Vandal, Partner, ^{the} Tourism Company
146 Laird Dr, Suite 201, Toronto, ON M4G 3V7 416 696 2182
jill.vandal@tourismco.com



the Tourism Company

August 25, 2014

TNO VISIT Review Committee

Tourism Northern Ontario

111 Elgin Street, Suite 304

Sault Ste. Marie, Ontario P6A 6L6

Via email: info@tourismnorthernontario.com

*RE: Northern Ontario Experiential Tourism Development Program: **Proposal***

Dear VISIT Review Committee,

We are pleased to submit a proposal in response to the Request for Proposal (RFP) to complete a Northern Ontario Experiential Tourism Development Program. ^{the} Tourism Company will partner with Tourism Café Canada and Tourism Synergy Ltd. to complete this assignment.

As documented in the proposal that follows, our team of senior professionals brings a broad perspective to this assignment including:

- Direct experience in the design and delivery of the VISIT program, its tools and solutions;
- Design and delivery of many of Canada's successful and sustainable tourism training programs; and
- In-depth understanding of the tourism sector across Northern Ontario.

Our approach to completing this assignment is to build a program plan that recommends a suite of training tools and solutions customized to the needs of Northern Ontario's front line and strategic tourism priorities. The program will be supported by a business model and implementation plan that provides clarity for all partners on roles and responsibilities.

The signed cover page of the RFP was faxed, as requested, on August 19, 2014.

Thank you for consideration of this proposal. We would be honoured to work with you on this important and exciting assignment. Should you have any questions or need clarification, please feel free to contact me at your convenience.

Yours truly,

N. Jill Vandal

Partner

^{the} Tourism Company

TABLE OF CONTENTS

Executive Summary	i
Team Profile	1
Our Experience	4
Our Understanding of the Project	6
Project Deliverables	6
Scope of Work	7
Description of How Requirements Will be Met	7
Project Management	8
Workplan	8
Schedule	17
Pricing	17
Closing Comments	19
References	20

EXECUTIVE SUMMARY

Three long-established boutique Canadian consulting firms, one east, one central and one west, all with 'tourism' in their company names, have partnered to work with you and your colleagues to design a tourism training and development program for Northern Ontario.

Our team's deep knowledge and experience in designing and delivering effective training programs, insights we bring from our extensive work across Northern Ontario, and our understanding of the possibilities for partnerships to deliver the program, will be invaluable in moving this initiative forward in a timely manner.

There are three main deliverables for this assignment:

1. **A Northern Ontario tourism development program** with a suite of a limited number of training, human resource capacity development and mentoring tools for operators and enablers to generate outcomes that contribute to achieving the strategic priorities for the tourism sector in Northern Ontario.
2. **An orientation program** to educate enablers about the tools and how to use them. Enablers include policy-makers, as well as those on the front line working with the tourism industry including management and staff of (RTOs, DMOs,) Community Futures Development Corporation (CFDC), FedNor, Municipal and First Nations Economic Development Officers and Ministry of Northern Development and Mines (MNDM) staff with responsibility for tourism.
3. **A business and implementation plan to support roll-out of the program in 2015/16** that outlines optimum roles, responsibilities, projected sources and uses of financial resources and a communications plan to gain support for implementation.

In order that the program is relevant, we will first confirm the needs of operators in enhancing the visitor experience, their product and/or marketing to increase the appeal of communities in across Northern Ontario. We will also confirm key outcomes required from the funding partners to contribute to tourism training and development. The process will then assess tools currently in-market, address any gaps and explore new ideas that address the realities of Northern Ontario.

TEAM PROFILE

Our approach to building a team to complete this assignment was to seek partners who have deep and long experience with designing, delivering and training in the tourism sector. Profiles of team members are outlined below.

Jill Vandal, M.B.A. EQAT, Partner, ^{the} **Tourism Company**, based in Ontario has designed and delivered many of Ontario's successful training programs, such as Tourism Keys (in partnership with Todd Lucier, Tourism



Clicks.com/Tourism Café), Tourism Training Needs Assessment for Northern Ontario Native Tourism Association and Resource Based Tourism Business Enhancement Program. Jill has also designed and delivered a GMIST program - Beacons of Effective Sustainable Tourism (BEST) - and has designed, planned and facilitated three best practices missions for Travel Manitoba – culinary tourism, agri-tourism and destination development. She was retained by the Ministry of Tourism to consult with the industry to develop a tool for communities to identify their key demand generators to support the Premier-ranked Tourist Destination Framework. Her extensive work in Saskatchewan includes a review of Quality Assurance programs across Canada and internationally providing useful insights for this assignment.

Jill was a core team member for the recently completed Northern Ontario Tourism Product Development Strategy, is supporting development of Ontario Signature Experiences in Hamilton Halton Brant and has and continues to travel and consult across Northern Ontario.

Jill has built a reputation for her ability to facilitate tough discussions, identifying and articulating themes that shape strategic direction for organizations, destinations and individual operations while also getting into the day to day details necessary to implement them successfully. She has completed business and strategic plans at provincial, regional, destination and individual operator levels.

Jill will be the Project Manager for this assignment and involved in most tasks, bringing her in-depth knowledge of Northern Ontario and the needs of the industry to the project team. She will also be the primary contact with the client, managing all communications including invoicing. For more information on Jill please refer to www.tourismco.com



Dynamic and engaging, **Dr. Nancy Arsenault** is the Managing Partner of **the Tourism Café**, a boutique tourism training and development company. Nancy is a builder! Not the bricks and mortar type, rather one who builds the skills of people and organizations so they can create new visitor experiences and educational programs based on a true understanding of the customer and what's happening with markets. She brings a 30-year career as an entrepreneur, business owner, educator, researcher, writer, historic site manager, instructional designer, senior government employee and volunteer. Their company is based in Victoria British Columbia, with a satellite office in South River Ontario where one of the partners, Todd Lucier, resides.

Passionate about the contribution of rural communities, small and medium businesses to the visitor experience and growing tourism, their company mantra is: *"Do what you do best, partner for the rest."*TM

Nancy's led the design and instructed a wide range of tourism programs from the well-known Edge of the Wedge Experiential Travel Training program at the Gros Morne Institute for Sustainable Tourism (taught face-to-face), to the MA in Tourism Management at Royal Roads University (with a blended delivery model), to an online experiential travel program, with community based facilitators, for the LaCloche Manitoulin Business Association. The Texas Heritage Commission and Alberta Parks, Tourism and Recreation secured the Tourism Cafe to lead the development of their tourism training plans.

Nancy holds a Ph.D. (Doctor of Philosophy) in Educational Travel, a Master of Arts in Educational Administration from McGill University, and a Bachelor of Recreation Studies from the University of Manitoba. Her content areas of expertise include: experiential travel, customer experience management, strategic planning, performance management, product and niche market development, marketing, business development, and instructional design.

In addition to the development of all aspects of the Business Model and Program Plan, Nancy will lead the identification of a training program to support travel experiences and outline merits and considerations of delivery and development options. For more information on Nancy please refer to www.tourismcafe.org



Laurel Reid, Ph. D. President of **Tourism Synergy Ltd.** and an Adjunct Professor at the University of New Brunswick. With a focus on Atlantic Canada, Tourism Synergy was formed in 2001 and offers expertise in sustainable planning and development for destinations, cultural tourism development, tourism marketing strategy, feasibility studies, travel distribution, market research and tourism education. Laurel has spent several years working with tourism businesses, associations, municipalities, Provinces and destinations involved in strategy

development. Recent work in New Zealand focused on tourism planning, policy and travel distribution channels.

She has a reputation for effectively facilitating community tourism development and building capacity. Laurel has also assisted with curriculum and workshop development for tourism and hospitality programs

for universities, colleges, governments and public-private partnerships, and is the lead-developer for the Bonavista Institute for Cultural Tourism in Bonavista, NL. She was instrumental in development of ACOA-Tourism Atlantic's VISIT (*Vision in Steering Intelligent Tourism*) program and assisted in developing and delivering the FEDNOR VISIT program in February 2014. Laurel has been involved in numerous other professional development workshops across Atlantic Canada and abroad.

Laurel holds a PhD (Doctor of Philosophy) in Parks, Recreation and Tourism Management (Clemson University, South Carolina, USA), a MCS (Master of Communication Studies) (University of Calgary, Alberta, Canada) and a BSc (Bachelor of Science) (Syracuse University, New York State, USA). Her work appears in several travel, tourism and marketing related books, journals and conference proceedings.

In addition to the development of all aspects of the Business Model and Program Plan, Laurel will share her insights and experience with the VISIT program. For more information on Laurel Reid please refer to: www.tourismsynergy.com

J. Michael Robbins, Founding Partner, ^{the} Tourism Company



Michael Robbins has over 34 years experience as a professional tourism consultant, having worked throughout Canada, as well as in the US, New Zealand/Australia, Southeast Asia, northern Africa, the Middle East, Eastern Europe and the Caribbean. With an environmental planning educational background Michael has focused his professional career on planning and developing more sustainable tourism models, minimizing environmental impacts and maximizing benefits to local communities and cultures. He began his career in 1979 with a large Canadian multi-disciplinary company (Marshall Macklin Monaghan), moved to New Zealand to work for a similar type of company for 3 years (Murray North) and then founded his own boutique management consulting firm in 1994.

Michael has a particular interest in tourism as a form of economic empowerment for indigenous peoples and has worked on a wide range of assignments with First Nation, Inuit, and Maori entrepreneurs and communities. He was the Project Manager from 2009 -2014 on planning, developing, capacity building and marketing the Arviat Community Ecotourism program (ACE), an internationally acclaimed best practice model in community-based tourism (winner of the WTTC *Tourism for Tomorrow Community* award in 2014, TIAC Finalist in the Cultural Category for 2012 and one of Tides Canada Top 10 Social Innovators of 2012).

Michael is currently Chairman of the Board of Directors with the Center for Responsible Travel (CREST) a policy oriented research institution based in Washington DC and at Stanford University (www.responsibletravel.org).

Mike will bring an objective perspective to the early stages of the assignment, assisting with the review of ACOA's VISIT program and tools, as well as reviewing options beyond VISIT.

Engaging Francophone Stakeholders

We will employ a combination of external translation services and team resources to engage francophone stakeholders. Relevant material as outlined below will be prepared using a translation service we have successfully used in the past.

- Selected consultation tools available in French as outlined in the work plan; and
- Final documentation will include translation of the Executive Summary into French.

All translations will be reviewed by **Paul Arsenault** from Tourism Café (who leads the Company's francophone research and writing activities) prior to release in order to ensure nuances are correct. His services will also be used to conduct interviews in French as required.

OUR EXPERIENCE

The team we have assembled is unsurpassed in its experience in designing and delivering training and industry development tools and solutions to enhance the visitor experience. All three companies have supported tourism development initiatives in Ontario and Northern Ontario. As a result, we understand the operational realities, the marketing and product development environments, the competitive context and range of stakeholders. A sample of relevant projects are presented below:

- *Vision in Steering Intelligent Tourism (VISIT): Bringing VISIT to Northern Ontario* – Participant Workshop and Associated Workbook; (2014)
- Ongoing work with the Board of Directors of Explorers Edge developing Business and Operational Plans;
- Destination Development Plan 2014-2017 for Explorers Edge;
- Tourism Product Development Strategy for Northern Ontario with BC Hughes; (2014)
- Group of Seven Experience Development in Algoma/Sault Ste. Marie; Northeastern Ontario; (2012-2014)
- Designed and delivered an online experiential travel program with community based facilitation for the LaCloche Manitoulin Business Association (2012);
- Northern Ontario Tourism Marketing Summit (2012);
- Great Spirit Circle Trail Canadian Signature Experience Case Study (2012)
- Understanding and Attracting the RV Tourism Market to Northern Ontario; (2006)
- Understanding Attracting the On-Road Motorcycle Tourism Market to Northern Ontario; (2006)
- Great Spirit Circle Trail Marketing Strategy & Business Plan, (2003-04);
- Great Lake Heritage Coast Tourism Development Strategy; (2002)
- Strategic Directions for Northern Ontario Tourism, for FedNor and the Ontario Ministry of Culture, Tourism and Recreation, (1992).

Details on select projects relevant to this assignment are outlined below.

RESOURCE BASED TOURISM BUSINESS ENHANCEMENT PROGRAM (2003)

the Tourism Company was retained by the Ontario Ministry of Northern Development and Mines, in partnership with the Canadian Tourism Commission and the Ontario Tourism Marketing Partnership, to design and deliver a series of workshops for resource-based tourism businesses considering new adventure or ecotourism opportunities. This program was designed through close consultation with the end-users to ensure that it was relevant and useful.

Six workshops were delivered to over 125 front line tourism suppliers in various regions of northern Ontario, including one designed for members of the Northern Ontario Native Tourism Association. Each workshop included presentations by experts and other tourism suppliers with experience in the transition to diversify away from consumptive activities.

In addition to delivering core elements of the workshops, Jill was the Project Manager responsible for all logistics, securing of experts and liaison with host facilities.

STEP (STRATEGIC TOURISM EXPANSION PROGRAM) AND AMR (ACCELERATED MARKET READINESS) CERTIFICATION WORKSHOP DELIVERY (2011-12)

STEP and AMR are two programs aimed at the development of sustainable tourism destinations (communities) and providing market readiness excellence for Atlantic Canada Businesses. Laurel Reid, Tourism Synergy helped develop these programs and certified other consultants for Atlantic Canada Opportunities Agency (ACOA) -Tourism Atlantic.

TEXAS HISTORICAL COMMISSION TOURISM PRODUCT DEVELOPMENT TRAINING PLAN (2012).

Nancy Arsenault, the Tourism Café Canada provided guidance and advice to the Texas Historical Commission regarding the investments need for in product development training in the state. The three goals were to: (1) Establish a model for the course house training that forms the basis for future training in different areas of visitor interest and tourism potential; (2) Design and deliver a community based training program throughout the state of Texas that is focused on educating tourism operators and enablers on product development as it pertains to the court houses, and (3) Develop a train-the-trainers capacity for Texas State Historical Commission staff and select community representatives to ensure a legacy capacity remains with the training investment.

A high-level tourism training plan, centered around the restored historic courthouses, complete with train-the-trainer considerations was provided to inform the budget decisions for training industry, plus a cadre of trainers to build capacity.

OUR UNDERSTANDING OF THE PROJECT

The tourism sector in Northern Ontario is a mix of urban/rural, niche/mass and public sector/private sector offers. Tourism operations are in various stages of development and maturity with widely varying training and development needs. The training landscape includes limited seasonality with many operators out of the country in low season and long, expensive travel distances. Access to technology in some areas is inconsistent, yet in others is enhanced and facilitated by partnerships with colleges, universities and other agencies.

At the organizational level, traditional roles and responsibilities continue to shift and adjust as Tourism Northern Ontario (TNO), Explorer's Edge (EE), regional Destination Marketing Organizations (DMOs), sector organizations and municipalities all respond to the changing landscape for tourism organizations.

Recent work completed, on behalf of TNO as part of the *Workforce Development and Training Strategy* as well as the *Tourism Product Development Strategy*, including extensive consultation with owners, operators and those on the front-line, reinforces the reality that the tourism sector across Northern Ontario has diverse training and capacity building needs. Alongside this reality, there are a plethora of existing training opportunities, programs and solutions available from various providers – some specific to tourism, others that support basic business skill development. Current or recent training opportunities for industry presented by TNO and EE include:

- Tourism Customer Service;
- Creating Packages that Sell;
- Coaching for Excellence;
- LGBT Tourism and Diversity Training;
- Social Media.

This assignment will develop a training program that will narrow and focus training and development investment and efforts into a small suite of tools and solutions to support product, experience and destination development priorities across Northern Ontario.

PROJECT DELIVERABLES

The identification of priority tools will align with and support tourism product development priorities and address current gaps. It is as much about supporting quality improvement as it is about supporting the delivery of new and enhanced travel experiences, all to attract and retain visitors.

This suite of tools and solutions will be administered as a branded program across Northern Ontario with investment by a range of partners.

There are three main deliverables for this assignment:

1. A **Northern Ontario tourism development program** with a suite of a limited number of standardized training, human resource capacity development and mentoring tools for operators and enablers to generate outcomes that contribute to achieving the strategic priorities for the tourism sector in Northern Ontario.
2. **An orientation program** to educate enablers about the tools and how to use them. Enablers include policy-makers, as well as those on the front line working with the tourism industry including management and staff of (RTOs, DMOs,) Community Futures Development Corporation (CFDC), FedNor, Municipal and First Nations Economic Development Officers and Ministry of Northern Development and Mines (MNDM) staff with responsibility for tourism.
3. **A business and implementation plan to support roll-out of the program in 2015/16** that outlines optimum roles, responsibilities, projected sources and uses of financial resources and a communications plan to gain support for implementation.

SCOPE OF WORK

The scope of this work involves an examination of the VISIT program as well as other experiential tourism development and training models/tools/research to develop a 'made in Northern Ontario' solution, complete with an implementation plan.

The work involves four Phases:

1. Foundational Scan;
2. Model Development;
3. Consultation and Communications; and
4. Implementation.

Each phase is detailed in our Work Plan below. The final objective is to set the stage to allow for funding partners and support organizations to roll out the program (all or parts) during 2015-16 under one umbrella.

DESCRIPTION OF HOW REQUIREMENTS WILL BE MET

In order that the program is relevant, we will first confirm the needs of operators in enhancing the visitor experience, their product and/or marketing to increase the appeal of communities in across Northern Ontario. We will also confirm key outcomes required from the funding partners to contribute to tourism training and development. The process will then assess tools currently in-market, address any gaps and explore new ideas that address the realities of Northern Ontario.

We will:

- Expand our review of solutions to ensure that the program is stronger if it considers the broad spectrum of possibilities;
- Design models for the training program (and its suite of offerings), plus the business model to sustain a long-term approach to development;
- Leverage the diverse, but complementary professional training and content expertise of the consulting team, staying objective as we consider programs we have individually developed, plus those of our colleagues. The focus is on ensuring the solutions provided are suitable for implementation in Northern Ontario; and
- Stay firmly focused on the future and respond to long-term outcomes needed rather than political pressures.

Our team will be an extension of your team. We will rely on your varied perspectives and needs to develop useful and relevant tools and content.

PROJECT MANAGEMENT

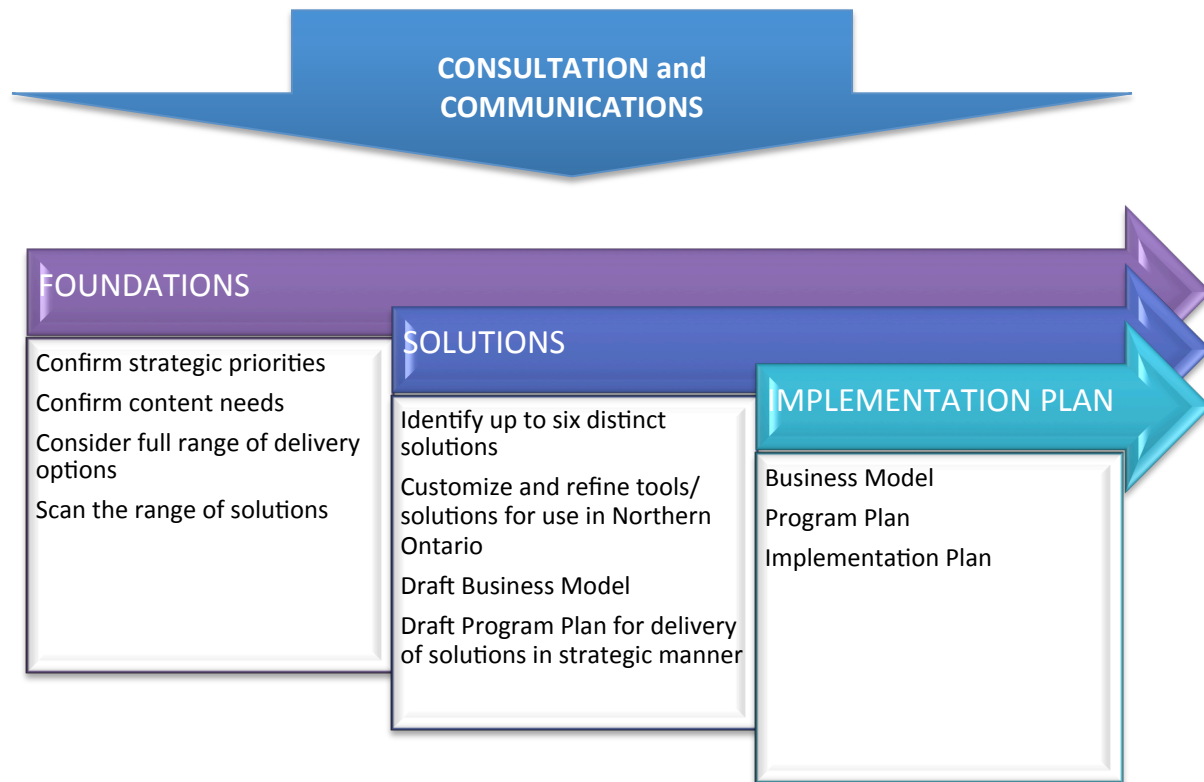
Jill Vandal, Partner, ^{the} Tourism Company will be the Project Manager and the primary contact with the client, providing regular updates and progress reports between formal Management Committee meetings as required.

We will use a combination of meeting options to be cost-effective and productive, including in-person, teleconference and virtual meetings that link various sites via such tools as Go To Meeting or ADOBE CONNECT.

WORKPLAN

Our general approach to completing this assignment will be to build on the current information, relevant documents and committee member/stakeholder input to efficiently and effectively design a branded tourism training program that will identify the most effective tools for generating results, which in turn will create opportunities for partnered investments and delivery.

In developing our work plan, we followed the four-phase approach suggested in the RFP. We believe that the process is multi-dimensional and so individual tasks will occur simultaneously as illustrated below.



Our proposed work plan follows. We are happy to review and revise it as required.

PHASE ONE: FOUNDATIONS

The work completed in Phase One will result in a shared understanding of the current state and desired priority tourism development and training needs across Northern Ontario as well as a common language. This will inform the overall program to be developed as well the recommended tools and solutions. A key element in this phase will be to ensure stakeholders understand the range of options in the market place, as well the current language used to describe the training tools, options, and solutions. For example, stakeholders will need to share common language and understand the difference between content (e.g. experiential tourism) vs. methodological approaches (e.g. lecture vs. experiential training) vs. tools and solutions (e.g. courses, toolkits, videos).

The tasks in Phase One acknowledge that two members of our team have long histories with key elements of the VISIT program and tools – Edge of the Wedge program and the Bonavista Institute for Cultural Tourism. As such, rather than send team members to participate in these programs, we felt that our time and efforts would be better used to expand our understanding of the impact of these tools through interviews with a broader range of organizations outside Atlantic Canada who have sent participants or adapted programs for delivery.

Task 1: Project Launch

We will convene a meeting with the Management Committee as soon as possible once the contract has been awarded. The purpose of this meeting is to introduce our team, review and confirm the terms of reference and our proposal as required, ask for any updates and clarifications from you as well as confirm process and expectations for review by you on draft documents, project timelines, identification of dates for in-person and teleconference/videoconference Management Committee meetings.

We anticipate other items on the agenda as follows:

- Discussion of “What success looks like” for a Northern Ontario Tourism Development Program.
- Discussion of your understanding of ‘experiential travel’ and what your expectations are for how the training should strengthen tourism operations and enhance the visitor experience.
- Discussion of your current understanding of the high(est) priority training needs and gaps for various stakeholders and end-users for the training including:
 - Operators;
 - Routes, destinations and communities;
 - Enablers (e.g. FedNor Field staff, Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), Economic development agencies including Community Futures Development Corporations (CFDCs) and others;
 - Delivery partners; and
 - Funding partners.
- Examination of the ACOA tools/solutions to determine which ones you think might work best (with possible modifications) in Northern Ontario, which ones need refinement and identify new learning opportunities that will move the industry forward.
- Obtaining insight on:
 - Content areas – things enablers, operators and funders need to know.
 - Learning methods – how they best learn (face-to-face, online, workshop).
 - Funding programs and partners – which organizations can fund and/or participate in delivery of select industry training solutions?
- Consideration of key questions to include in interviews in Task 4.
- General discussion on criteria for use in a matrix for evaluating potential solutions.
- Confirmation of roles and responsibilities of the Management Committee, our team and other key partners.

Task 2: Confirmation of Tourism Training and Capacity Development Priorities for Northern Ontario

The identification of training and capacity development needs across the tourism sector in Northern Ontario is not starting from scratch, as a significant amount of work and consultation with operators has recently been completed. In order to avoid duplication and move quickly to solutions, we will review and summarize all relevant reports, strategies and documentation produced by TNO, Explorer's Edge and others as appropriate to consolidate tourism development and training priorities identified for Northern Ontario. Reports to be reviewed include:

- Feedback and Evaluation of VISIT Workshop February 2014;
- Tourism Product Development Strategy for Northern Ontario (2014);
- Northern Ontario Tourism Workforce Development and Training Strategy (2014);
- Tourism Northern Ontario Wayfinding Strategy (2014);
- TNO Strategic Implementation Plan (under way);
- Market Development Plan International and U.S. Travel Trade (stage 1 2014; stage 2 under development);
- Explorer's Edge Destination Development Plan 2014-2017; and
- Explorer's Edge Business and Operational Plan 2014-2015.

To further round out our understanding of the current training and development context we will complete telephone interviews with key partners such as FedNor, MNDM, Ontario Ministry of Tourism and Ontario Tourism Marketing Partnership Corporation to gather details on current priorities and funding programs of stakeholder and partners.

At the end of this task we will have a comprehensive understanding of current tourism development and training priorities for Northern Ontario from the perspective of operators, communities, organizations and funding agencies. These priorities will be kept front and centre as tools and solutions are identified and prioritized.

Task 3: Understanding the Merits of Various Training Delivery and Development Options

It is important for all parties to share common language around what this program will do and not do, understand what experiential learning is and how this differs from the content focus on experiential travel. In addition, there must be a shared understanding the range of ways training can be delivered on and off-line (e.g. courses, study tourism, best practice missions,) the pros and cons for each including such elements as time commitments, financial and technical requirements, etc.

We will identify a variety of training solutions that could become part of the over program, complete with their merits and challenges.

Task 4: Review and Analysis of ACOA's VISIT Tools, Solutions and Program

ACOA's VISIT program has a number of elements that include individual tools, a range of solutions and the VISIT program itself, which is the means to orient ACOA staff, economic development agencies, regional tourism organizations and DMOs to the resources available.

Using the evaluation matrix developed in Task 1 and interview guidelines endorsed by you, our review to assess each tool and solution will include the following activities:

- Review of all ACOA tools, solutions, reports, analysis and evaluations;
- In-person interviews/meetings with key ACOA management and staff, as required, to gather additional insights and clarifications;
- Telephone interviews of approximately 30 minutes each with up to 15 stakeholders who participated in the VISIT program delivered in Sudbury in February 2014;
- Telephone interviews of approximately 30 minutes each with three organizations outside Atlantic Canada such as Travel Manitoba, LaCloche Manitoulin Business Assistance Corporation (LAMBAC), Ontario's Highlands Tourism Organization (OHTO- RTO 11), the Boomtown Trail or Jasper National Park in Alberta, who have sent individuals to participate in programs at GMIST and/or BICT or that have adapted programs for delivery in their home jurisdiction.
- Telephone interviews up of approximately 30 minutes each with up to four enablers/funders in Atlantic Canada such as Destination Cape Breton, Adventure Central, Hospitality Newfoundland and Labrador (HNL), New Brunswick Museum Zone(s) that have "bought into" some or all of the ACOA tools (e.g. AMR, GMIST programs such as the Edge of the Wedge, BICT) to get their feedback on the relative success of the tool(s) from the participating organizations' perspective and their feedback from operators, issues and challenges with administering the programs, extent of funding provided to participants and soliciting support for participation.
- Review of the success and challenges in the use of VISIT as a means to introduce and orient front-line influencers such as economic development agencies and DMOs to the tools and solutions that are part of the program.

In addition to the review of ACOA training opportunities we will articulate the operational side of VISIT as an introduction and orientation program and identify issues relevant to this assignment.

At the end of this task, we will be in a position to identify which aspects of the VISIT program are best suited to adopt and/or refine for use in Northern Ontario, what is required, and lessons learned that are relevant to this assignment.

Task 5: Assessment of Other Tools, Solutions and Programs

We will expand the possibilities by outlining tourism development options offered elsewhere in Ontario, across Canada and in international jurisdictions in order to provide optimum recommendations for Northern Ontario.

We anticipate that a limited number of programs and/or business models (3-5) will be selected for review and in response to outstanding needs and gaps identified earlier in the process and may include for example:

- Nordic Innovation Centre's *Storytelling and Destination Development*;
- Australia's *National Landscape Program*;
- World Host (Destination BC);
- GMIST (The Gros Morne Co-op Association); and
- Newfoundland & Labrador Cultural Economic Development Program – Heritage focus.

The assessment will consider program purpose, objectives, audience, content, delivery methods, learning outcomes and the business/financing model.

Task 6: Foundations Discussion Paper

We will prepare and forward a concise summary of information gathered to date including:

- Highest priority training and development needs for various audiences;
- Summary of partner programs and priorities;
- Summary of training delivery options;
- Key learnings from ACOA's delivery of the tools and solutions included in the VISIT program.
- Recommendations of which ACOA tools are most relevant to Northern Ontario;
- Identification of gaps in tourism development tools and recommendations on how to address gaps;
- Key factors of success for adoption and implementation of training and development programs; and
- Emerging opportunities – narrowing the options.

Task 7: Management Committee Working Meeting

We will convene an in-person Management Committee working meeting to review the *Foundations Discussion Paper* and identify implications on the next phases of this assignment.

PHASE TWO: MODEL DEVELOPMENT

Based on feedback provided by you on work completed to date, we will develop two draft models as detailed below. We will use diagrams, models and other visual means to communicate the essence of each.

Task 8: Draft Business Model

The *Business Model*, directed primarily at funding and delivery partners, provides an outline of the overall program, funding opportunities and clarity around who does what. More specifically the Business Model will outline:

- Development and Training Framework for Tourism in Northern Ontario.
- The value proposition, goals, and desired outcomes for the program so funding partners, who support developing the tourism industry, will understand their investment opportunity as it aligns with their mandate.
- Foundations or operating principles.
- Name/brand for overarching umbrella program, customized to Northern Ontario.
- High level overview of recommended suite of tools/solutions.
- Roles and responsibilities for implementation of the training program.
- Projected costs/revenue streams associated with delivery of each tool/solution and potential organization(s) responsible for same.
- Evaluation mechanisms.

Task 9: Draft Program Plan

The *Program Plan* will outline operational plans for each tool/solution including, for example, description of tool, the goal, alignment with priorities, broad content, intended outcomes, primary audience, and recommended means of delivery. We anticipate that the tools/solutions recommended will be a mix of VISIT tools with some modifications and new tools, from other models and jurisdictions adapted for use in Northern Ontario.

Task 10: Phase Two Report and Management Committee Validation Meeting

We will forward draft models developed in Tasks 9 and 10 to you and convene a conference call to review the *Business Model* and *Program Plan* to obtain your input, advice, and discuss next steps.

Task 11: Refine the Business Model and Program Plan

Based on your feedback (Task 10) we will refine and adjust individual tools as required in order to facilitate and support implementation in 2015/16. The draft *Business Model* and *Program Plan* will be approved and endorsed by the Management Committee, however, will remain as “Drafts” until stakeholders are consulted and provide input on both models.

PHASE THREE: CONSULTATION AND COMMUNICATIONS

Phase Three has two elements. The first involves consultation in the early stages of the process to gather input on the draft models to determine if/how they resonate with needs, identification of gaps and recommendations on how to implement them.

The second element, once models have been fully developed and endorsed by the Management Committee sets the stage for successful implementation of the program.

We will provide updates and invitations to provide feedback for posting on the TNO and EE industry websites, as well as those of DMOs, sub-regions, municipal organizations and relevant industry organizations as appropriate.

Task 12: Consultation

Our consultation program will build on the extensive consultation with operators already completed by TNO to engage decision-makers, policy makers, influencers and partner organizations. Based on our collective experience, we believe that the most information is gleaned from one on one or small group meetings. To do this in a cost-effective, yet comprehensive manner we recommend the following approach.

- Team member(s) will be in attendance at the first Northern Ontario Tourism Summit to be held November 17 to 19, 2014 in Thunder Bay to present a plenary session that provides context for this assignment, a status report on work completed to date and to share any emerging conclusions, as endorsed by the Management Committee. We will also share means to provide feedback as the project progresses.
- Once draft material has been endorsed by you we will create a narrated PPT in both English and French for viewing by industry, stakeholders and partners on demand. This PPT will be made available via email link and accompanied by a standardized response form, for completion via on-line survey (Survey Monkey). Stakeholders and industry will be invited to view the PPT and complete the survey by a specific date.
- When possible we will attend or join planned stakeholder meetings with virtual tools to present highlights and gather input.

Task 13: Communications Plan for Key Partners

We will develop a Communications Plan to inform and engage key partners and stakeholders, identified by you, to review and endorse the *Business Model* and *Program Plan*. These communications will lay the groundwork for discussing partnerships to support the program as well as individual tools/solutions.

Following the concept outlined in Task 12, above, we recommend using a narrated PPT customized to this audience to provide flexibility and reach across to North. Following viewing, we will complete one on one telephone or where possible in-person interviews to gauge interest and commitment to the Business Model and Program Plan.

In some instances, it may be more effective for you to make these contacts. In that case we will provide you with tools and messaging for use by you.

PHASE FOUR: IMPLEMENTATION PLAN FOR THE PROGRAM

Task 14: Implementation Plan for Tourism Development and Training Program in Northern Ontario.

We will consolidate all work done to date and prepare a comprehensive implementation plan for the Development and Training Program for Tourism in Northern Ontario that will include:

- Name, customized to Northern Ontario for umbrella program, framework and goals.
- *Business Model* for the umbrella program including roles and responsibilities, financial parameters, and administration of the program.
- *Program Plan* that outlines operational plans for each tool/solution including how delivered, where delivered, recommended delivery partner, frequency of offer, criteria for participation and financial parameters.
- *Implementation Plan* with actions and milestones identified for one year, three year and five-year timelines.

Task 15: Management Committee Meeting

We will convene a Management Committee Meeting to review the Implementation Plan.

Task 16: Final Documentation

We will revise documents as required and submit one full hard copy in English with a supplementary French executive summary. The document will be provided in MS Word and Adobe PDF format for printing and distribution by you.

SCHEDULE

The proposed schedule outlined below assumes that initiation of this assignment will be in early September 2014. We will work closely with you to complete by the end of February 2015, which assumes that the Management Committee will respond to requests for review and other feedback in a timely manner.

		2014				2015	
		Sept	Oct	Nov	Dec	Jan	Feb
Phase 1: Foundations							
1	Project Launch						
2	Confirmation of Tourism Training and Capacity Development Priorities						
3	Understanding the Merits of Various Training Delivery and Development Options						
4	Review & Analysis of ACOA's Visit Tools, Solutions & Program						
5	Assessment of Other Tools, Solutions and Programs						
6	Foundations Discussion Paper						
7	Management Committee Working Meeting						
Phase 2: Model Development							
8	Draft Business Model						
9	Draft Program Plan						
10	Phase 2 Report & Management Committee Validation Meeting						
11	Refinement of Business Model and Program Plan						
Phase 3: Consultation & Communications							
12	Consultation						
13	Communications with Key Partners						
Phase 4: Implementation Plan for the Program							
14	Implementation Plan for Tourism Development & Training Program						
15	Management Committee Meeting						
16	Final Documentation						

PRICING

Based on the work plan presented and our experience with projects of a similar scope, we are prepared to complete this assignment for a fixed price of \$109,900 for this assignment. This includes professional fees at a value of \$99,400 and an allowance for disbursements of \$10,500. HST @ 13% on fees and disbursements for \$14,290 is extra and will be charged.

We will commit resources where and when they are needed to get the job done. As a result, there may be some migration of budget between fees for core team, specialized expertise and expenses along with adjustments on level of effort by task. In no case will the total budget of \$109,900 before HST be exceeded.

Estimates for expenses include the following assumptions:

- We will manage expenses to maximize consulting expertise. In other words, we would rather available resources are used to support our time rather than expenses.

- When in-person Management Committee meetings are scheduled, Jill will always be in attendance. Laurel and Nancy will typically join the meeting virtually via teleconference or other means.
- Jill and Laurel both have existing commitments in the study area and will leverage these opportunities while in the field, when feasible to interact with members of the Management Committee, partners and stakeholders.
- Costs for virtual and/or in-person working team meetings is included.
- Expenses will be billed to the project at cost.
- Translation of content for revised or new tools is not included in our estimates for expenses.

	the Tourism Company		Tourism Café Canada		Tourism Synergy	TOTAL
	J Vandal	M Robbins	N Arsenault	P Arsenault	L Reid	
Phase 1: Foundations	\$ 1,400	\$ 1,400	\$ 1,400	\$ 700	\$ 1,400	
1 Project Launch	0.5		0.5		0.5	
2 Confirmation of Tourism Training and Capacity Development Priorities		1				
3 Understanding the Merits of Various Training Delivery and Development Options			1			
4 Review & Analysis of ACOA's Visit Tools, Solutions & Program	3	2	0.5	1	0.5	
5 Assessment of Other Tools, Solutions and Programs	0.5	2	0.5		0.5	
6 Foundations Discussion Paper	3		2		2	
7 Management Committee Working Meeting	1		1		1	
<i>sub-total time</i>	8	5	5.5	1	4.5	
<i>sub-total fees</i>	\$ 11,200	\$ 7,000	\$ 7,700	\$ 700	\$ 6,300	\$ 32,900
Phase 2: Model Development						
8 Draft Business Model	3		2		2	
9 Draft Program Plan	2		2		2	
10 Phase 2 Report & Management Committee Validation Meeting	1		1		1	
11 Refinement of Business Model and Program Plan	1.5		1		1	
<i>sub-total time</i>	8	-	6	-	6	
<i>sub-total fees</i>	\$ 10,500	\$ -	\$ 8,400	\$ -	\$ 8,400	\$ 27,300
Phase 3: Consultation & Communications						
12 Consultation	4		1	1	1	
13 Communications Plan for Key Partners	3		0.5	1	0.5	
<i>sub-total time</i>	7		1.5	2	1.5	
<i>sub-total fees</i>	\$ 9,800	\$ -	\$ 2,100	\$ 1,400	\$ 2,100	\$ 15,400
Phase 4: Implementation Plan for the Program						
14 Implementation Plan for Tourism Development & Training Program	4		3		3	
15 Management Committee Meeting	1		0.5		0.5	
16 Final Documentation	3		1		1	
<i>sub-total time</i>	8		4.5	0	4.5	17
<i>sub-total fees</i>	\$ 11,200	\$ -	\$ 6,300	\$ -	\$ 6,300	\$ 23,800
TOTAL TIME	31	5	18	3	17	
TOTAL FEES	\$ 42,700	\$ 7,000	\$ 24,500	\$ 2,100	\$ 23,100	\$ 99,400

EXPENSES	
travel and related	\$ 6,000
translation, production, communications	\$ 4,500
sub-total expenses	\$ 10,500
TOTAL Fees and Expenses	\$109,900
HST	\$ 14,290
TOTAL	\$124,190

A suggested invoicing schedule is outlined below.

- Early September 2014 upon signing of contract: \$40,000 plus HST.
- Late November/early December 2014 upon submission of draft models: \$30,000 plus HST.
- End of January 2015: \$20,000 plus HST.
- February upon submission of final documents: \$19,900 plus HST.

We would be happy to review this schedule with you.

CLOSING COMMENTS

Our team would be honoured to have the opportunity to work with you on this exciting initiative that has the potential to contribute significantly the growth of a sustainable tourism sector across Northern Ontario.

REFERENCES

We would be pleased to have you contact the following to confirm our experience in work related to this assignment, as well as the quality of our work, and our commitment to finishing on-time and on-budget.

For Jill Vandal

Lori Waldbrook Senior Marketing Specialist, Ontario Parks,
300 Water Street, 6th Flr South Tower, Peterborough, ON K9J 8M5
Tel: 705 755-1703 Lori.Waldbrook@ontario.ca

Jill has worked extensively with Lori, most recently when she was a member of the Management Committee for the Tourism Product Development Strategy for Northern Ontario. Jill worked with Lori and Ontario's product development initiatives, which included the Packaging and Travel Trade manuals as well as product alliances such as Paddling Ontario and Arts in the Wild. Jill recently worked with Lori as Jill developed a Toolkit for the Ontario Parks 'Friends'.

For Laurel Reid

Mr. Rob McCloskey, Director General, Tourism Atlantic (ACOA)
100 Sydney Street, 3rd Floor, Royal Bank Building, Charlottetown, PEI C1A 1G3
Tel: 902-626-2479 Email: rob.mccloskey@acoa-apeca.gc.ca

Mr. McCloskey is very familiar with the expertise and work of Laurel Reid over a decade of work on tourism and professional development projects throughout Atlantic Canada, including the VISIT program and its various components as well as course/workshop development for the BICT.

For Nancy Arsenault

Mr. Jonathan Foster, Executive Director, the Gros Morne Institute for Sustainable Tourism (GMIST)
PO Box 130, Rocky Harbour, NL A0K 4N0
Mobile: 1.506.754.1200 Email: jonathan@gmist.ca

Mr. Foster has collaborated with Nancy as the Edge of the Wedge Experiential Travel program has evolved it's content over the years and 32 deliverables to ensure ongoing industry relevance. They have also collaborated in discussions with other organizations across Canada that have explored building their capacity based on the GMIST model (E.g. Travel Manitoba, Travel Alberta, the Boomtown Trail). He is very familiar with her skills, work ethic, customer centric approach to developing learning solutions, and experience working with all levels of government and stakeholders.