

2022-02-07

**REQUEST FOR PROPOSAL
RFP 06 (2022-02)
SITE WIDE INTERPRETIVE COMMUNICATIONS MASTER PLAN**

Toronto Zoo invites proposals from qualified and experienced consultants or consultant teams to provide professional services to facilitate and lead the development of a site-wide Interpretive Communications Master Plan, the first of its kind for our Zoo. The consultant will play the critical role of helping us uncover our story/stories and defining the best techniques to effectively engage with our audiences around our story/stories.

All proponents are expected to review the content of the RFP carefully to ensure all costs, resources and services are included to deliver the proposed project.

The Proposal package includes Instructions, Background, Project Description, Proposal requirements, and Forms. Quoted prices shall remain in effect for a period of ninety (90) days from the Proposal due date.

Due Date: Monday 2022-02-28 1200 hours (noon) local time

The Board of Management of the Toronto Zoo reserves the right to reject any or all proposals, or to accept any proposal, should it deem such an action to be in its interests.

For any questions concerning the contract terms and conditions of this RFP, please contact, Peter Vasilopoulos, Supervisor, Purchasing & Supply, at 416-392-5916, pvasilopoulos@torontozoo.ca. Deadline for written questions is Friday 2022-02-14.

Yours truly,

Alia Lee
Director, Finance & Technology

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INSTRUCTIONS

1. Review and complete the RFP requirements and enclosed FORMS and return by due date and time, **Tuesday 2022-02-28, 1200 hours (noon) local time.**
2. Submission – Temporary process - In view of the current situation with COVID 19 and to limit personal interaction, on a temporary basis submissions for this Request for Proposal can be submitted

electronically by email in a PDF file, prior to the submission deadline to the following email address: bids@torontozoo.ca

and note the following:

- a. Subject of the file to be: RFP# - Title of RFP – Vendor name.
- b. Amendments to a Proposal may be submitted via the same methods, at any time prior to the Closing Time.
- c. It is the Supplier's sole responsibility to ensure its Bid is received by the Submission Deadline in accordance with the requirements of this RFP. The receipt of Bids can be delayed due to a number of factors including "internet traffic", file transfer size and transmission speed. The Supplier should allow sufficient time to download, complete and upload, as applicable, the submission forms comprising its Bid and any attachments.

A Bid will only be considered to be submitted once it has been received by the Toronto Zoo. The time of such receipt is reflected by the time received stamped by the Toronto Zoo's email application

3. The person(s) authorized to sign on behalf of the Proponent and to bind the Proponent to statements made in response to this Request for Proposal must sign the proposal.
4. All copies of all pages of the Proposal should be printed in duplex (i.e. on both sides of the pages) where possible and 11 point font.
5. All proposals will be irrevocable for a period of ninety (90) days from the date of the proposal deadline.
6. The duration of the assignment is expected to be approximately nine (9) months. The contract may be extended by the Zoo on mutually acceptable terms.
7. Pricing should be in Canadian dollars.
8. Quote discounts or quantity price breaks separately on FORMS.
9. Provide references of at least three (3) clients for whom your company has performed similar work. References must include client company name, contact name, address and e-mail address

Toronto Zoo, in its sole discretion, may confirm the Proponent's experience and or ability described in its Proposal by checking the Proponent's references. The provision of the

references by the Proponent is deemed to be consent to such confirmation/contact with the references.

Toronto Zoo reserves the right to revisit the Proponent's scores in the rated requirements based on information learned during reference checks, should they reveal that there is inconsistency between the Proponent's answers to the rated requirements and the results of the reference checks.

10. For any questions concerning the contract terms and conditions of this RFP, please contact, Peter Vasilopoulos, Supervisor, Purchasing & Supply, at 416-392-5916, pvasilopoulos@torontozoo.ca.

1.0 DEFINITIONS

- 1.1 The following definitions will apply to this Request for Proposal and to any subsequent Contract:
- 1.1.1 “**Board**” means the Board of Management of the Toronto Zoo;
 - 1.1.2 “**Consultant**” means the person, partnership or corporation contracting with the Board to provide the required Services;
 - 1.1.3 “**Contract**” means acceptance by the Toronto Zoo (by way of written acknowledgement, Agreement, Contract or Purchase Order) to furnish Services for money or other considerations;
 - 1.1.4 “**Contract Price**” means the price payable under the contract to the Consultant, being the Proposal Price eventually accepted by the Board of Management of the Toronto Zoo subject to any changes pursuant to the Contract Requirements;
 - 1.1.5 “**Preferred Respondent**”: means the respondent deemed by the Board of Management of the Toronto Zoo to have the highest ranked assessment of its response according to the process set out herein;
 - 1.1.6 “**Proponent**” means an individual or company that submits or intends to submit, a proposal in response to this Request for Proposal;
 - 1.1.7 “**Proposal Price**”, “**Contract**” and “**Contract Documents**” have the meanings set out therefore in clauses contained in these documents;
 - 1.1.8 “**Request for Proposal (RFP)**” means the RFP document in its entirety, inclusive of any addenda that may be issued by the Toronto Zoo;
 - 1.1.9 “**Services**” or “**Work**” means everything that is necessary to be performed, furnished delivered by the Consultant to meet the Consultant’s obligation under this Contract;
 - 1.1.10 “**Selection Committee**” means a committee of designated Toronto Zoo staff created to oversee the project.

2.0 BACKGROUND AND PROJECT SCOPE

BACKGROUND

The Toronto Zoo opened August 15, 1974 and is home to more than 4,000 animals and 300 exhibits organized into 9 main regions representing the world's biomes. Open year round, the Zoo is situated on more than 500 acres of land in the picturesque Rouge Valley, directly adjacent to Rouge National Urban Park, and attracts approximately 1.2 million guests annually (with approximately 80% attending between the months of May to October). The Zoo is a highly regarded educational resource with over 110,000 children from Grades K-12 visiting annually and enrolled in a variety of curriculum-linked programs and tours. The Zoo also has a strong membership base of 35,994 households, mainly comprised of families with young children.

An iconic tourist attraction and conservation organization, the Toronto Zoo boasts a number of prominent programs for conserving wildlife and their natural habitats – from species breeding and reintroduction to ground-breaking reproductive research to innovative educational experiences. A world-class educational centre for people of all ages, the Toronto Zoo is accredited by Canada's Accredited Zoos and Aquariums (CAZA) and the Association of Zoos and Aquariums (AZA). The Zoo is a not-for-profit organization and is stewarded by a Board of Management.

The Toronto Zoo has changed considerably since its opening and continues to evolve as we move forward with a renewed 2020-2025 Strategic Plan, new Master Plan, including the creation of a new front entrance and Conservation Campus, and new Technology Master Plan. The Toronto Zoo's Mission is to *connect people, animals and conservation science to fight extinction* and our Vision is *a world where wildlife and wild spaces thrive*. The main strategic initiatives in our 2020-2025 Strategic Plan are to:

- Save wildlife by creating a centre of excellence in conservation, sustainability, animal care, and science
- Ignite the passion: Build the team for the future
- Create “wow”: Reimagine the guest experience
- Envision the Zoo as the heart of the community
- Lead the way for innovation and technology for zoos worldwide

Central to what we do are the “4 Cares”: our animals, our team, our guests, and our community. We care for and value our animals as the basis of our conservation and public education efforts. We care about our team of Staff and Volunteers as they are the driving force in delivering our Mission. Our guests are partners in our Mission. We strive to provide comfortable, iconic, and memorable experiences and learning. Our community are key champions for wildlife conservation and their support of the Zoo is critical.

PROJECT SCOPE

The Toronto Zoo is seeking a qualified and experienced consultants or consultant teams to facilitate and develop a site-wide Interpretive Communications Master Plan, the first of its kind for our Zoo. The outcome of the project will be a comprehensive, cohesive, and organized “blueprint” for storytelling/messaging throughout the entire site, as well as the pre/post Zoo experience, online presence and our voice in the community that will invite our diverse audiences to discover, connect with, and support the Zoo's story, enabling them to take conservation action in support of our mission. The Interpretive Communications Master Plan should build from the [Zoo's Strategic Plan 2020-2025](#), [Animal Lives with Purpose Plan](#), Master Plan, Technology Master Plan, Conservation Science Plan, and Sustainability Plan to design interpretive guest experiences that will help us achieve our goals, including delivering effective calls to action for people to support conservation.

The consultant will play the critical role of helping us uncover our story/stories and defining the best techniques to effectively engage with our audiences around our story/stories. The Interpretive Communications Master Plan must consider the existing site, as well as future development of the Zoo, and reflect personal and non-personal interpretation, including existing and future exhibits, signage (static and digital), digital applications, interpretive offerings, online presence, marketing, and pre/post experience. It must tie strongly to our long-term goals and objectives as set out in key strategic plans/documents identified above.

The plan should also investigate and consider the various types of Zoo guests, how they flow through the site, and how messaging will be connected as different audiences experience different elements of the Zoo (exhibits, keeper talks, Waterside Theatre shows), explore different routes, and/or whether they visit several different areas of the Zoo or only a small portion.

Key in the development of this plan will be consultations with staff, volunteers, and stakeholders to explore, reveal, and define our storyline (specific themes and messages for different areas) and how it will be relayed to guests throughout our physical site and online presence, including recommendations on best locations to relay certain messages and most impactful means/tools for sharing our stories, allowing us to create deep, meaningful connections that inspire our guests to care about and take action to protect wildlife and wild spaces.

Some of the key aspects to be reflected in the plan by the successful proponent include (but are not limited to):

- Equity, diversity, accessibility, and inclusion: reflect on our messaging, experiences offered, and modes of delivery to ensure we are inclusive, supportive, and welcoming to diverse audiences and communities including Indigenous ways of knowing. Any plans should incorporate Universal Design standards to ensure they are accessible to all.
- Embed conservation action messaging into exhibit interpretation, and provide opportunities for on-site immediate action and fundraising opportunities
- Showcase signature Zoo conservation projects in our online communications and in our exhibits; make the 'hidden Zoo' become extinct
- Linking exhibits and experiences to real-world places and locations
- Add/improve multi-lingual interpretation
- Strong focus on exploring new interpretive technologies and integrating existing apps with our stories/experiences
- Use technology to add value and extend post-visit experience such as 'at home' activities, webcams, etc.
- Include connections to plants and develop/increase programming on native species
- Provide different modes of communication, including digital technologies, incorporate existing wayfinding signs, and exhibit interpretation, beginning at website and continuing throughout the Zoo

Consultant to provide a phased implementation plan suggesting priorities for elements identified within the plan and resources to support implementation and future projects.

The terms of this engagement are outlined in a deliverable of set objectives over approximately 8-12 months, to commence immediately upon award and issuance of a purchase order. Implementation of the plan would begin in 2023, setting us up well for the Zoo's 50th anniversary celebration in 2024.

3.0 PROJECT DESCRIPTION AND DELIVERABLES

Objective/Project Description:

The objective of this Request for Proposal is for the Toronto Zoo to secure the services of a qualified consultant or consultant team with experience in developing interpretive communications master plans for similar organizations to facilitate and lead the creation of a comprehensive written site-wide Interpretive Communications Master Plan. This plan would work in tandem with other guiding documents (2020-2025 Strategic Plan, Master Plan, Technology Master Plan, Animal Lives with Purpose Plan) and define a cohesive Zoo wide storyline identifying specific themes and messages for each Zoo Region and it's exhibits including personal and non-personal interpretive offerings, as well as pre/post visit experience, online presence, and our voice in the community. The plan will also identify methods of message delivery, target audiences for delivery, and measurements of success.

Reporting to the Senior Director of Strategic Communications & Guest Engagement (Project Manager) and working with the project team members, including our Indigenous Advisor, Learning & Engagement Staff, and Wildlife Science Staff, the Consultant will undertake the following:

Methodology and Approach

Proponents should provide a mutually agreeable project management plan that clearly describes all phases noted below of the project with schedule, responsibilities, and deliverables.

The successful Consultant will submit to the Senior Director of Strategic Communications & Guest Engagement (Project Manager) a bi-weekly summary of the project progress.

Toronto Zoo is looking for teams who can define the best process they see fit to meet deliverables and objectives within the following parameters:

3.1 Review Background Related Documents

3.1.1 Review relevant documents to understand organizational goals, direction, and audience data, including but not limited to: Strategic Plan 2020-2025, Master Plan, Technology Master Plan, Animal Lives with Purpose Plan, Education Plan, Conservation Science Plan, Marketing Plan, Sustainability Plan, and wayfinding project reports.

3.1.2 Review recent results from Zoo-initiated surveys including annual/monthly guest surveys, Membership survey, and the Wildlife Conservancy survey.

3.1.3 Review MOU's from partners with links to interpretive opportunities/elements

3.2 Research

3.2.1 Examine Interpretive Master Plans from other major zoos and/or similar organizations to identify best practices, innovations, and framework/components for development of plan.

3.2.2 Complete an inventory of existing themes/messages and modes of delivery in each region of the Toronto Zoo, as well as our online presence.

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- 3.2.3 Examine planning process and style guide for on-site interpretive signage and provide feedback and recommendations for incorporating into the plan.
 - 3.2.4 Review and gather information (if needed) to fully understand the Zoo's current and target/prospective audiences and their needs/interests. Note: a variety of survey info./data already exists that would be shared.
 - 3.2.5 Review and gather information on equity-seeking/underserved audiences and communities, including Indigenous communities, to understand how we can better reach, involve, and connect with these communities through interpretation.
 - 3.2.6 Examine current trends and innovations in guest experience and conservation interpretation, including but not limited to new and emerging technology.

3.3 Stakeholder Consultation and Interviews

- 3.3.1 Design and conduct stakeholder consultations with Zoo staff and stakeholders including Zoo Volunteers, Members, Board of Management, City of Toronto staff, the general public and key partner institutions such as, University of Toronto Scarborough, Centennial College, and other community partners. Stakeholder consultation is extremely important to us and must be a key driver in determining the final product. Ample stakeholder consultation is expected and can be done in multiple ways including but not limited to online surveys, virtual and in-person meetings.
- 3.3.2 Facilitate and lead meetings with project team members to collect information, discuss findings of research and review process, and work to define the plan elements.

3.4 Consolidation, Review and Final Documents

- 3.4.1 Based on the findings from your research and initial consultation provide and present an initial draft of the Interpretive Communications Master Plan. The draft should include the principles and priorities underlying the plan's formulation and demonstrate how key considerations and best practices are incorporated into the plan from the research, document review, and initial consultations. Any data collected throughout the process should be provide to the Zoo for use as desired.
- 3.4.2 Based on feedback of the initial draft of the Interpretive Communications Master Plan develop and present a second, more honed Interpretive and Communications Master Plan for review by Zoo staff and other stakeholders, and facilitate consultation sessions for collecting input.
- 3.4.3 Based on stakeholder input in 3.4.2 above refine the draft Interpretive Communications Master Plan into final draft form and submit and present it to the Toronto Zoo for review.
- 3.4.4 Present the draft Interpretive Communications Master Plan to the Toronto Zoo Board of Management for approval.

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- 3.4.5 Any documentation prepared by the Consultant shall be provided to the Toronto Zoo in both hard copies and electronic format. A Final Report shall be issued following staff comments on the final draft. In addition, City staff may require the Consultant to conduct a PowerPoint presentation to Toronto Zoo officials. Eight (8) copies of the Final Report will be required along with an electronic copy.
- 3.4.6 Provide five (5) colour versions of the complete set of documentation
- 3.4.7 Provide one (1) digital copy of the complete set of documentation.

3.5 Deliverables

Further to 3.1 to 3.4, successful Consultant to provide:

Inventory of Zoo's existing site themes, messages, and modes of delivery

Written summary of audience research and raw data

Guest flow analysis

Written summary of consultation sessions and raw data

Presentation of initial draft of Plan for review

Present second draft of Plan for review/consultation sessions

Final written Plan which should include but not limited to:

- Introduction & Purpose
- Guest/Audience Analysis
- Overarching Interpretive Goals, Outcomes, Principles
- Definition of process for planning future interpretive projects
- Defining Themes and Messaging
 - Overarching story for the site and story elements (theme, messaging) for each region including online presence (website, social media), pre/post experience, and our voice within the community.
 - Within each region, subthemes and specific outcomes/indicators for key exhibits/areas/places and interpretive delivery methods and media.
- Summary of Evaluation Recommendations
- Phased Implementation Plan

Presentation of final draft to Board of Management for approval

Presentation of final plan to Staff, Volunteers, and Stakeholders

Note: where possible/appropriate visual representations of concepts/deliverables should be included.

3.6 Contract term

The terms of this engagement are outlined in a deliverable of set objectives identified below, to commence immediately upon award and issuance of a purchase order. The Toronto Zoo reserves the right, in its sole and absolute discretion, to extend the term for an additional mutual agreed upon time period based on the same terms and conditions, by providing written notice to the Vendor in advance of such optional period.

4.0 SCHEDULE OF EVENTS

The following is a tentative schedule for the Interpretive Communications Master Planning process. The final schedule will be developed jointly with the successful proponent in the first week of project execution:

Pre-Award	
Release of RFP	2022-02-07
Proponents' Question Deadline	2022-02-14
Submission Due	2022-02-28
Interviews, if necessary	Week of 2022-03-07
Notification of Award by the Toronto Zoo	2022-03-14
Post-Award	
Commencement of Work	Week of 2022-03-14
Draft visioning document and Preliminary Findings Report Presentation	2022-06-10
Completion of Consultations	2022-07-15
Revised draft report and strategy due	2022-09-16
Final Report / Presentation Due	2022-10-14
Final Report / Presentation to Board	(TBC)
Final Report / Presentation to Staff/Volunteers/Stakeholders	(TBC)

The RFP process and project will be governed according to the above schedule or other schedule provided by the Consultant and approved by the CEO of the Toronto Zoo. Although every attempt will be made to meet all dates listed, the Toronto Zoo reserves the right to modify any or all dates at its sole discretion. Appropriate notice of change will be provided, in writing, as soon as is feasible so that each Proponent will be given the same non-preferential treatment.

5.0 FEE PROPOSAL

- 5.1 The proposal shall specify and state a firm not to exceed price using the attached form, Appendix A, including total fees and expenses (excluding taxes) in order to complete the assignment.
- 5.2 The Consultant shall not perform any Services or Work that would result in an increase in fee payable by the Toronto Zoo without the prior written approval of the Toronto Zoo.
- 5.3 The Consultant shall, even if the rate of payment set forth in the Proposal is based on an hourly rate, daily or other time based rate, perform all of the Services required to complete the deliverables, regardless of the fact that the time spent by the Consultant in performance may exceed the maximum specified therein, and that neither the rate nor

any provision of the Proposal shall relieve the Consultant from performing all the Services or reduce its obligations to one of performing only some proportionate or other part of the Services.

- 5.4 The Toronto Zoo is a registered charitable organization (registration #BN 119216398RR0001) and accordingly may be eligible for preferred pricing which should be reflected in the Bid as submitted.

6.0 PROPOSAL SUBMISSION FORMAT

The following page format and sequence should be followed to provide consistency in the Proponent response and ensure each Proposal receives full consideration.

- 6.1 Title page, showing Request for Proposal number, Proponent's name, telephone number, authorized signature and contact name.
- 6.2 The page letter of introduction, signed by the person or persons authorized to sign on behalf of and bind the Proponent to the statements made on the Proposal.
- 6.3 Table of Contents.
- 6.4 Executive summary.
- 6.5 Duly executed Proposal Form.
- 6.6 Corporate Information.
- 6.7 Detailed experience, background and other similar project opportunities completed within the past five (5) years.
- 6.8 Provide three (3) references including name, address contact person and telephone number from clients with similar projects as outlined in this RFP, do not list the Toronto Zoo as a reference.
- 6.9 Proposed staff team and resources including detailed biographies of team lead and key members and their roles.
- 6.10 Estimated time frame to complete the project deliverables and work plan or schedule with key dates and milestones and the accompanying identification of staff and resources that will be assigned to this project.
- 6.11 Identified conflict of interests in the event if the Proponent's representation of any of its clients could create a conflict of interest should the Proponent provide services to the Toronto Zoo.

7.0 PROPOSAL EVALUATION CRITERIA

The Proponent is urged to ensure that its Proposal is submitted in the most favourable terms in order to reflect the best possible potential, since less than best potential could result in exclusion of the Proposal from further consideration.

The RFP will not be awarded to the Proposal with the lowest cost, but rather, award shall be based on an evaluation of the Consulting team's expertise, prior project experience, proposed methodology, and price. Additionally, the Zoo may accept or reject any part of the Proponent's bid.

An Evaluation Team comprised of representatives designated by the Zoo will evaluate responses to the RFP.

There are three steps to the pre-defined evaluation process:

Step 1 – Initial Review of Responses

Step 2 – Evaluation of Submitted Proposals

Step 3 – Evaluation of Presentations

Step 1 – Initial Review of Responses

The Zoo will open only those Proposals received by the Proposal Deadline and time specified within this RFP. Immediately upon opening, the Zoo will review each Proposal for compliance with the instructions and conditions applicable to this RFP. The Zoo, at its option, may seek Proponent retraction and clarification of any discrepancy/contradiction found during its review of Proposals.

Step 2 – Detailed Review

Evaluation Point Rating [Threshold Requirements]

Proposals will be assessed on a point rating system, outlined below, with a maximum 80 technical and experience points and a maximum of 20 for proposal fee. This is used to determine each proponent’s strategic and technical fit to the needs described in the proposal documents. The technical points will be added together with the reference and proposal fee points (outlined below) to determine a final point score out of 100.

Proposals scoring less than a total threshold of 56 (70%) technical and reference points will be considered technically unacceptable. Proposals that meet or exceed the 56 technical point threshold score will have their proposal fee scored.

Evaluation Criteria	Points
Depth and breadth of the consultant/consultant team’s relevant qualifications and experience	10
Past experience on similar scale and type of projects especially as it pertains to Interpretive Communications Master Planning	10
Availability of team members during entire Project;	5
Understanding of Project scope of work and details on the general approach;	10
Commitment to complete work according to Schedule of Events within the RFP	10
Methodology that proponent would take in performing the services outlined within the RFP	15
Detailed workplan and schedule	10
References and samples of past relevant work	10
PROPOSAL FEE EVALUATION	Maximum Points
TOTAL TECHNICAL EVALUATION	80
MINIMUM THRESHOLD–TECHNICAL EVALUATION (70%)	56

The lowest cost proposal that is qualified to stage two and meets the technical point threshold will receive 20 points. The remaining proposals will be assigned points based upon the following formula: (lowest cost proposal <u>divided by</u> proponent’s proposal cost x 20	20
TOTAL FEE EVALUATION	20

Proposal Fee Evaluation

Pricing is worth 20 points of the total score. Pricing will be scored based on a relative pricing formula of each Proponent. Each Proponent will receive a percentage of the total possible points allocated to price for the particular category it has submitted a Proposal for, which will be calculated in accordance with the following

- a. The lowest cost proposal receives 20 points.
- b. The remaining Proposals are assigned based on the following formula

$$\text{Lowest cost proposal} \div \text{Proponent's Price} \times \text{Weighting} = \text{Proponent's Pricing Points:}$$

Stage 3– Interview (if required)

Based on the paper submission proposal scoring, high-scoring Proponents may be asked to attend an interview.

Proponent’s presentation of proposal and performance, including ability to answer questions	50
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The proposals submitted will be evaluated using the evaluation criteria and will be comprehensively reviewed by the Selection Team. It is the sole discretion of the Toronto Zoo to select its Selection Team and to retain additional members and advisors as deemed necessary.

The Selection Team will select one or more proposals which in its sole opinion:

- a) Meets or exceeds the evaluation criteria, including but not limited, as outlined above;
- b) Has a demonstrated track record of success with similar projects, and
- c) Provides the best value, but may not necessarily be the one(s) offering the lowest fees.

All proposal scores and rankings shall be the property of the Toronto Zoo and will not disclose any of the same during or after the evaluation process. Due to budget and time constraints, the Selection Team will not be able to provide debriefs for unsuccessful proponents. By responding to this RFP, the proponents will be deemed to have agreed that the decision of the Selection Team will be final and binding.

8.0 NEGOTIATIONS AND AWARD

- 8.1 The successful Proponent shall be retained through the issuance of a Purchase Order or a formal agreement in a form prescribed by the Toronto Zoo, which shall include the terms and conditions of this Request for Proposal.

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- 8.2 The award of any Agreement will be at the absolute discretion of the Toronto Zoo. The selection of the Preferred Proponent will not oblige the Toronto Zoo to negotiate or execute an Agreement with that Preferred Proponent.
 - 8.3 The Toronto Zoo shall have the right to negotiate on such matter(s) as it chooses with the Preferred Proponent without obligation to communicate, negotiate or review similar modifications with other Proponents. The Toronto Zoo shall incur no liability to any other Proponent as a result of such negotiation or alternative arrangements.
 - 8.4 During negotiations, the scope of the services may be refined, issues may be prioritized, responsibilities among the Proponent, all staff and sub-consultants provided by it and the Board may be settled and the issues concerning implementation may be clarified.
 - 8.5 If any Agreement cannot be negotiated within thirty (30) business days of notification to the Preferred Proponent, the Toronto Zoo may, at its sole discretion, choose to continue negotiations for a period of time, terminate negotiations with that Proponent and negotiate an Agreement with another Proponent or abort the RFP process and not enter into any Agreement with any of the Proponents.

9.0 PROPOSAL TERMS AND PROVISIONS

The successful Proponent shall be retained through a contractual agreement and/or a purchase order, which includes the terms and conditions of this Request for Proposal.

9.1 Consultant's Liability and Indemnity

The Consultant will from time to time at all times hereafter well and truly save, defend and keep harmless and fully indemnify the Board, the City of Toronto, and the Toronto and Region Conservation Authority and each of their officers, employees and agents (hereinafter called the "Toronto Indemnities") of, from and against all manner of action, suits, claims, executions and demands which may be brought against or made upon the Toronto Indemnities or any of them and of, from and against all loss, costs, charges, damages, liens and expenses which may be sustained, incurred or paid by the Toronto Indemnities, their officers, employees and agents or any of them by reason of or on account of or in consequence of the execution of this agreement or provision of the business or any other work or matter to be carried out or performed by the Proponent with respect to the Request for Proposal or any agreement that may result from the request for proposal process, and/or the non-execution or imperfect or improper execution thereof and will pay to the Toronto Indemnities on demand any loss, costs, damages and expenses which may be sustained, incurred or paid by the Toronto Indemnities or any of them in consequence of any such action, suit, claim, lien, execution or demand and any monies paid or payable by the Toronto Indemnities or any of them in settlement or discharge on account thereof.

The Consultant shall be responsible for any and all damages, or claims for damages for injuries or accidents done or caused by his or her employees, or resulting from the prosecution of the Work, or any of their operations, or caused by reason of the existence of location or condition of the works, or of any materials, plant or machinery used thereon or therein, or which may happen by reason thereof, or arising from any failure, neglect or omission on their part, or on the part of any of their employees to do or perform any or all of the several acts or things required to be done by him or them under and by these General Conditions, and covenants and agrees to hold the Board, the Toronto and Region Conservation Authority and the City of Toronto, their officers, agents, employees, Consultants and invitees harmless and indemnified for all such damages and claims for damage; and in case of the Consultant's failure, neglect or omission to observe and perform faithfully and strictly, all the provisions of the Work, the CEO may, either with or without notice (except where in these Contract Requirements, notice is specially provided for, and then upon giving the notice therein provided for), take such steps, procure such material, plant trucks and men, and do such work or things as he/she may deem advisable toward carrying out and enforcing the same and any such action by the CEO as he is herein empowered to take, shall not in any way relieve the Consultant or his/her surety from any liability under the Contract.

9.2 Insurance Requirements (at the discretion of the Toronto Zoo)

- 9.2.1 The Consultant shall effect, maintain and keep in force, at its sole cost and expense and satisfactory to the CEO as to form and substance the insurance described below:
- 9.2.2 The Consultant shall be required to arrange, pay for and maintain in force at all times at the Consultant's expense such comprehensive policies of insurance as applicable to persons undertaking the Work, including liability and professional

liability (errors and omissions) coverage which are to be written in amounts, with deductible limits and terms that shall be subject to the approval of the Toronto Zoo at all times.

The Consultant shall provide certified copies of such insurance or a certificate(s) of insurance as determined by, and upon request of, the Toronto Zoo. Without limiting the generality of the foregoing, the comprehensive general liability policy coverage required under the Contract will be Two Million (\$2,000,000) Dollars minimum and the policy shall name the Toronto Zoo and the City of Toronto as insured as if a separate policy had been issued to each and shall include a cross/liability-severability of interest clause.

Standard automobile liability insurance for all owned vehicles with limits of not less than Two Million Dollars (\$2,000,000.00) per occurrence.

- 9.2.3 All policies of insurance required to be taken out by the Consultant shall be placed with insurers licensed to conduct business in the Province of Ontario and shall be subject to the approval of the CEO, acting reasonably.
- 9.2.4 The Consultant shall deliver to the Board evidence of the insurance required prior to the commencement of the agreement, in form and detail satisfactory to the CEO acting reasonably.
- 9.2.5 All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the CEO.
- 9.2.6 The provisions of this section shall no way limit the requirements and obligations imposed on the Consultant elsewhere in the Contract, nor relieve the Consultant from compliance therewith and fulfillment thereof.
- 9.2.7 The parties agree that insurance policies may be subject to deductible amounts, which deductible amounts shall be borne by the Contract.

9.3 Incurred costs

The Proponent shall bear all costs and expenses with respect to the preparation and submission of its Proposal and the Proponent's participation in the proposal process (the "Proposal Costs"), including but not limited to: all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board and contract discussions and negotiations.

The Toronto Zoo shall not be responsible for or liable to pay any Proposal Costs of any Proponent regardless of the conduct or outcome of the Proposal Request, Purchase Order process, or Contract process.

- 9.4 The RFP does not constitute an offer or tender by the Toronto Zoo. Receipt of Proposals by the Toronto Zoo pursuant to this RFP or selection or notification confers no rights under any Proposal nor obligates the Toronto Zoo in any manner whatsoever.

9.5 Liability of Errors

While the Toronto Zoo has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Toronto Zoo, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

9.6 Toronto Zoo Rights and Options Reserved:

The Toronto Zoo reserves the right to award the contract to any proponent who will best serve the interest of the Toronto Zoo. The Toronto Zoo reserves the right, in its sole discretion, to exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- (a) To reject any or all proposals.
- (b) To re-issue this RFP at any time prior to award of work.
- (c) To cancel this RFP with or without issuing another RFP.
- (d) To supplement, amend, substitute or otherwise modify this RFP at any time prior to the selection of one or more proponents for negotiation.
- (e) To accept or reject any or all of the items in any proposal and award the work in whole or in part.
- (f) To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements.
- (g) To permit or reject at the Toronto Zoo's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the proponents following proposal submission.
- (h) To request that some or all of the proponents modify proposals based upon the Toronto Zoo's review and evaluation.
- (i) To request additional or clarifying information or more detailed information from any Proponent at any time, before or after proposal submission, including information inadvertently omitted by the proponent.

9.7 Cancellation

Nothing herein shall be construed as giving the Proponent the right to perform the services contemplated under this agreement beyond the time when such services become unsatisfactory to the Toronto Zoo; and in the event that the Proponent shall be discharged before all the services contemplated hereunder have been completed or the services are for any reason terminated, stopped or discontinued because of the inability of the Proponent to serve under this agreement, the Proponent shall be paid only for the portion of the work which shall have been satisfactorily completed at the time of termination.

9.8 Ownership and Confidentiality of Board-Provided Data

All correspondence, documentation and information provided by the Toronto Zoo staff to any bidder or prospective Bidder in connection with, or arising out of this RFP, the services or acceptance of the RFP:

- 9.1.1 is and shall remain the property of the Board;
- 9.1.2 must be treated by Proponents and Prospective Proponents as confidential;
- 9.1.3 must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent agreement.

9.9 Copyright:

The final product and related materials from the work is to be for the exclusive use of the Toronto Zoo. The Toronto Zoo shall be the only and sole owner of the product and related materials for the sole and unfettered use by the Toronto Zoo. Upon payment of the said product and related materials by the Toronto Zoo, the successful bidder shall have no hold, proprietary claim, ownership, use of any kind, intellectual or otherwise nor shall there be any restrictions placed on the final product and related products by the successful bidder. By submitting a Proposal in this response to this RFP, the Bidder shall thereby acknowledge and agrees that the Toronto Zoo has exclusive ownership and sole and unfettered use of this final product and related products.

9.10 Ownership and Disclosure of Proposal Documentation

The documentation composing any Proposal submitted in response to this RFP, along with all correspondence, documentation and information provided to the Toronto Zoo by any Bidder in connection with, or arising of this RFP, once received by the Toronto Zoo:

- 9.1.4 Shall become property of the Toronto Zoo and may be appended to purchase order issued to the successful Bidder;
- 9.1.5 Shall be come subject to the Municipal *Freedom of Information and Protection of Privacy Act* (“*MFIPPA*”) and may be released pursuant to that Act

Because of *MFIPPA*, prospective Bidders are advised to identify in their Proposal material any scientific, technical, commercial, proprietary or similar confidential information, the disclosure of which could cause them injury.

Each Bidder’s name shall be made public. Proposals will be made available to member of the Board on a confidential basis and may be released to members of the public pursuant to *MFIPPA*.

9.11 Conflict of Interest Statement

In its Proposal, the Proponent must disclose to the Toronto Zoo any potential conflict of interest that might comprise the performance of the Work. If such a conflict of interest does exist, the Toronto Zoo may, at its discretion, refuse to consider the Proposal.

The Proponent must also disclose whether it is aware of any Toronto Zoo employee, member of board, agency or commission or employee thereof having a financial interest in the Proponent and the nature of that interest. If such an interest exists or arises during the evaluation process or the negotiation of the Agreement, the Toronto Zoo may, at its discretion, refuse to consider the Proposal or withhold the awarding of any agreement to the Proponent until the matter is resolved to the Toronto Zoo’s sole satisfaction.

Proponents are cautioned that the acceptance of their Proposal may preclude them from participating as a Proponent in subsequent projects where a conflict of interest may arise. The Consultant(s) for this project may participate in subsequent/other Toronto Zoo projects provided the Consultant(s) has (have) satisfied pre-qualification requirement of the Toronto

Zoo, if any and in the opinion of the Toronto Zoo, no conflict of interest would adversely affect the performance and successful completion of an Agreement by the Consultant(s).

If, during the Proposal evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to potential conflict of interest, then the Proponent will so inform the Toronto Zoo. If the Toronto Zoo requests, then the Proponent will refuse the new assignment or will take steps as are necessary to remove the conflict of interest concerned.

9.12 No Collusion

A proponent shall not discuss or communicate, directly or indirectly, with any other Proponent or their agent or representative about the preparation of the Proposals, Each proponent shall attest by virtue of signing the Proposal Submission Form that its participation in the RFP process is conducted without any collusion or fraud. If the Toronto Zoo discovers there has been a breach of this requirement at any time, the Toronto Zoo reserves the right to disqualify the Proposal or terminate any ensuing Agreement.

9.13 Governing Law

This RFP and any quotation submitted in response to it and the process contemplated by this RFP including any ensuing Agreement shall be governed by the laws of the Province of Ontario. Any dispute arising out of this RFP or this RFP process will be determined by a court of competent jurisdiction in the Province of Ontario

10.0 PROPOSAL FORM

The undersigned Proponent **having the authority to bind the organization** and having reviewed and fully understood the RFP and all terms and requirements of the RFP and all terms and conditions of the RFP and information provided, hereby submits the attached Proposal and supporting materials (“the Proposal”) in accordance.

I/We, hereby, have received, allowed for and included as part of our submission all issued Addendum numbered _____.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

By submitting a Proposal the Proponent agrees to all of the terms and conditions of this Request for Proposal.

By signing and submitting this proposal, you are agreeing to the release of your proposal information, as deemed necessary by the Board, in order to conduct business associated with this proposal or project.

COMPANY INFORMATION	
Company Name:	
Name of authorized Signing Officer	Title:
Signature:	Date:
I have authority to bind the organization	
Contact Name:	Title:
Address:	
Telephone #:	Fax #:
Email:	Web Site:
HST #:	

DISCOUNT	Discount	Days
Discount allowed for prompt payment and period within which invoice must be paid to qualify.	%	

NOTICE OF NO BID

INSTRUCTIONS:

It is important to the Toronto Zoo to receive a reply from all invited bidders. If you are unable, or do not wish to submit a bid, please complete the following portions of this form. State your reason for not bidding by checking the applicable box(es) or by explaining briefly in the space provided. It is not necessary to return any other Request for Proposal/Quotation/Tender documents or forms. Please complete this form and submit by email to purchasing@torontozoo.ca or by fax or **(416) 392-6711** prior to the official closing date.

A Proposal/Quotation/Tender is not submitted for the following reason(s):	
<input type="checkbox"/> Project/quantity too large.	<input type="checkbox"/> Project/quantity too small.
<input type="checkbox"/> We do not offer services or commodities to these requirements	<input type="checkbox"/> Cannot meet delivery or completion requirement
<input type="checkbox"/> We do not offer this service or commodity.	<input type="checkbox"/> Agreements with other company do not permit us to sell directly.
<input type="checkbox"/> Cannot handle due to present commitments.	<input type="checkbox"/> Licensing restrictions
<input type="checkbox"/> Unable to bid competitively.	<input type="checkbox"/> We do not wish to bid on this service or commodity in the future.
<input type="checkbox"/> Insufficient information to prepare quote/proposal/tender	<input type="checkbox"/> Specifications are not sufficiently defined
<input type="checkbox"/> We are unable to meet bonding or insurance requirements.	

<u>Other reasons or additional comments (please explain):</u>

Company Name:	
Address	
Contact Person:	
Signature of Company Representative:	
Date:	
Phone Number:	
Email address	
Fax Number:	

SUBMISSION LABEL (N/A)**INTENTIONALLY LEFT BLANK**



APPENDIX A – SCHEDULE OF FEES/PRICES

The Bidder hereby Bids and offers to enter into the Contract referred to and to supply and do all or any part of the Work which is set out or called for in this Bid, at the unit prices, and/or lump sums, hereinafter stated, HST is additional. Hourly rates are inclusive of the cost of services, mileage and equipment required to complete the work, including but not limited to applicable taxes, overhead, profit and all other associated bidder expenses, excluding HST.

The quantities provide are estimates only and the Toronto Zoo does NOT guarantee any volume. The Toronto Zoo reserves the right, at its sole discretion, to procure either more or less.

* Denotes a "MANDATORY" field.

Do not enter \$0.00 dollars unless you are providing the line item at zero dollars to the Owner.

If the line item and/or table is "NON-MANDATORY" and you are not bidding on it, leave the table and/or line item blank.

Pricing Form

Line Item	Description	UOM	Lump Sum Price *
1	Lump Sum Price to develop a Site Wide Interpretive Communications Master Plan as described within the RFP - Section 2.0, 3.0 and 4.0	Lump Sum	
Subtotal:			

Table of Hourly Rates

Project Role	Team Member	Hourly Rate	
			*



Summary Table

Bid Form	Amount
Pricing Form	
Subtotal Contract Amount:	

APPENDIX B– KEY PERSONNEL

Instructions: Provide the information as outlined in Proposal Submission Section 6.6 and 6.8

Name	Project Role	% of Total Hours	Years of Experience	Relevant Project Experience	
				Project Description	Project Responsibilities

APPENDIX C - Relevant Experience and References

List relevant experience and client references that demonstrate the respondent's experience in the last five (5) years. Attach additional sheets as required.

Project Reference One:

Client / Company Name:			
Representative for the Client:		Phone No.	
		Email Address:	
Location of Work:			
Nature / Scope of Work:			
Contract Dollar Value:			

Date and Length of Contract:			
Provide the names of Assigned Staff:			

Project Reference Two:

Client / Company Name:			
Representative for the Client:		Phone No.	
		Email Address:	
Location of Work:			
Nature / Scope of Work:			
Contract Dollar Value:			
Date and Length of Contract:			
Provide the names of Assigned Staff:			



Project Reference Three:			
Client / Company Name:			
Representative for the Client:		Phone No.	
		Email Address:	
Location of Work:			
Nature / Scope of Work:			
Contract Dollar Value:			
Date and Length of Contract:			
Provide the names of Assigned Staff:			

APPENDIX D – LIST OF SUB-CONTRACTOR

The Bidder proposes to sublet the following portions of the Work to the persons firms or corporations indicated. The Bidder (contractor) is responsible for all pricing with all subcontractors.

The Bidder submits that in proposing the under mentioned subcontractors, the Bidder has consulted each and have ascertained to our completed satisfaction that those names are fully acquainted with the extent and nature of the work and that they will execute their work with the requirements of the contract documents.

Work or services to be provided	Name and address of sub-contractor or person	Telephone

Name of Bidder:	
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APPENDIX E – ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT (AODA)

The Toronto Zoo supports the goals of the Accessibility for Ontarians with Disabilities Act (AODA), 2005 and is committed to providing equal treatment and equitable benefits of Toronto Zoo services, programs and facilities in a manner that respects the dignity and independence of people with disabilities.

Accessibility for Ontarians with Disabilities Act (AODA) Requirements: "Pursuant to Section 6 of Ontario Regulation 429/07 ("Regulation"), Accessibility Standards for Customer Service made under the Accessibility for Ontarians with Disabilities Act, 2005, the contractor, i.e. successful bidder/proponent, shall ensure that all of its employees, agents, volunteers, or others for whom it is at law responsible, receive training about the provision of the goods and services contemplated herein to persons with disabilities. Such training shall be provided in accordance with Section 6 of the Regulation and shall include, without limitation, a review of the purposes of the Act and the requirements of the Regulation, as well as instruction regarding all matters set out in Section 6 of the Regulation. This training will take approximately twenty minutes and is available on-line at <http://www.mcsc.gov.on.ca/mcsc/serve-ability/splash.html>

The contractor, i.e. successful bidder/ proponent where requested by the Toronto Zoo shall provide written proof that all employees, agents, volunteers, or others for whom it is at law responsible have been trained as required under the act as well as any documentation regarding training policies, practices and procedures."



APPENDIX F - COVID-19 Proof of Vaccination Requirements

All business visitors, contractors, sub-contractors, service providers, consultants, deliverers and vendors, any of whom may require access to our Zoo property, must be fully vaccinated with a COVID-19 vaccine. This requirement shall be in addition to any other division-specific policies regarding COVID-19 vaccination or under regulations, legislation or guidelines applicable to them.

I acknowledge and confirm that I shall comply with the above direction, including providing proof of vaccine status as required by the Toronto Zoo.

Name:
I have authority to bind the Business Partner

Title: