



CCAB Brand/Sub-brand Refresh 2023/24
Request for Proposals

Issued By: Canadian Council for Aboriginal Business (CCAB)

Request for Proposals Issued: June 2, 2023

Proposal Submission Deadline: 5 p.m. EST on Friday, June 16, 2023

CCAB shall not be obligated in any manner to any proponent whatsoever until a written agreement has been duly executed with a supplier.

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STATEMENT OF PURPOSE

Canadian Council for Aboriginal Business (“CCAB”) is seeking bids from independent suppliers (“Bidder”) who have demonstrated professional competence and experience in undertaking brand/sub-brand reviews and refreshes (“Services”) as outlined in this Request for Proposal (“RFP”).

MISSION AND VALUES

Core Values

- Respect for all Aboriginal cultures
- High standards of ethics and integrity
- Open, honest, and transparent relationships with all stakeholders

Mission

To promote, strengthen and enhance a prosperous Indigenous economy through the fostering of business relationships, opportunities and awareness for all our members.

BACKGROUND INFORMATION

CCAB is a national member-based organization. Our membership includes Indigenous businesses, community-owned economic development corporations, and companies operating in Canada. We are governed by a voluntary Board of Directors that are representative of our membership as patrons, Indigenous business members, and senior industry leaders. The staff is a team of dynamic professionals dedicated to economic reconciliation and growing the Indigenous economy for the benefit of all Canadians.

CCAB is a non-partisan/non-profit organization with a mission to promote, strengthen and enhance a prosperous Indigenous economy through the fostering of business relationships, opportunities, and awareness. We are supported through corporate funding, event sponsorship, and membership dues.

CCAB Brand/Sub-Brand Refresh

SCOPE OF SERVICES REQUIRED

Canadian Council for Aboriginal Business (CCAB) is seeking services from a firm to lead us through a brand/sub-brand refresh (including evaluating and potentially refreshing logos, graphic, trademarks, fonts and typography, taglines, color palettes, etc.) and either a full or partial name change for CCAB, as well as for its distinct departments, programs and projects in both English and French. This effort should focus on providing guidance in terms of the recommended scope of the project, as well as executing the necessary actions and initiatives to undertake this project. These efforts should focus on the following:

An Evaluation of the Current Situation

- Evaluate our current situation in terms of where, how and when the current branding/name is utilized.

Brand Refresh Strategy

- Recommendations regarding which elements of the brand/sub-brands to refresh and which to leave as they are currently used. Develop a strategy for communicating and marketing the project both internally and externally.

Risk Management and Mitigation

- Provide recommendations and strategies regarding internal and external risks and plans to mitigate those risks.

Budget and Timelines

- Provide a budget and timelines regarding milestones and priorities through to completion at the presentation of the brand/sub-brand refresh to stakeholders in May 2024.

Design, Planning and Development

- Present no less than three full-scope creative concepts for approval and develop a plan of action for execution for our marketing, communications and events team, as well as for all impacted teams and departments within CCAB.

Execution and Delivery

- Deliver brand/sub-brand recommendations, reports, files and assets according to agreed-upon timelines and budget.

To complete these efforts several elements are critical and a path forward must be developed. Our organization sees these efforts occurring in three phases with the following work provided.

Recommendations and Planning

- Initial evaluation of scope of project as well as effectiveness of current brand/sub-brands.
- Provide a summary report of risks and risk mitigation efforts, including to the organization itself as well as for stakeholders and members.
- Provide a detailed report regarding recommended next steps, timelines and budget requirements.
- Provide a marketing/communications plan for communicating and launching the brand/sub-brand refresh.
- Host virtual/in-person (to be determined) session CCAB Brand Refresh Advisory Committee to discuss the findings and above reports and determine next steps and receive approvals.

Development

- Contracted firm will then present no less (but possibly more than) three creative package options for each brand/sub-brand selected by CCAB to undergo the refresh.

Execution and Completion

Consulting firm will ensure all required deliverables below are provided to CCAB, submitted on time and according to budget including:

- Brand/Sub-brand Development: new brand and sub-brand names (English and French); brand positioning; brand narrative; topline key messages;

- Brand/Sub-brand Identities and Relationships: logos (English and French); colour palette; guidelines on look and feel; fonts and typography; guidelines on imagery selection;
- Brand Relationships: recommended strategy on the overarching brand and sub-brands; align all brand logos and brand identities; recommend how they interact and relate;
- Asset Development: brand guidelines; PPTs; e-signatures; others TBD through brand/sub-brand refresh process;
- Website: recommendations on website strategy between brand and sub-brands; and
- Launch: provide recommendations and support on rollout and launch strategy.

*Please note, deadlines will be negotiated and finalized by the Brand Refresh Advisory Committee after the scope of the project is determined, but general milestones would include:

- September 1, 2023 – All recommendations and planning reports completed
- October 20, 2023 – Creative concepts due
- March 8, 2024 – All branding/sub-branding refresh deliverables completed
- April 2024 – Launch preparation assistance

Summary of Deliverables

- Initial evaluation of scope of project as well as effectiveness of current brand/sub-brands.
- Provide a summary report of risks and risk mitigation efforts, including to the organization itself as well as for stakeholders and members.
- Provide a detailed report regarding next steps, timelines and budget requirements.
- Provide a marketing/communications plan for communicating the brand refresh.
- Host virtual/in-person (to be determined) session to present creative concepts for brand/sub-brand refreshes (no less than three options).
- Upon approval, execute approved plans providing files, graphics, documents, support and strategies according to previously approved timelines, guidelines and budgets. This would include:
 - Brand/Sub-brand Development: new brand and sub-brand names (English and French); brand positioning; brand narrative; topline key messages;
 - Brand/Sub-brand Identities and relationships: logos (English and French); colour palette; guidelines on look and feel; fonts and typography; guidelines on imagery selection;
 - Brand Relationships: recommended strategy on the overarching brand and sub-brands; align all brand logos and brand identities; recommend how they interact and relate;
 - Asset Development: brand guidelines; PPTs; e-signatures; others TBD through brand/sub-brand refresh process;
 - Website: recommendations on website strategy between brand and sub-brands; and
 - Launch: provide recommendations and support on rollout and launch strategy.

TERMS AND CONDITIONS

Commencement and Termination of Services

The majority of the work will take place from July 2, 2023, to approximately April 2024.

Work Performance

Performance of the work will be offsite – the successful bidder to carry out work in their office location and most communications will be via email, video conferences or telephone.

Intellectual Property

The Bidder shall not use any intellectual property of CCAB, including but not limited to, CCAB and CCAB partner and sponsor logos, registered trademarks, or trade names of CCAB, at any time without the prior written approval of CCAB.

Withdrawal or Amendment of Proposal

A Bidder may withdraw or make amends to a proposal by providing written notice to the CCAB contact person before the proposal submission deadline. A proposal may not be withdrawn or amended after the proposal submission deadline. CCAB has no obligation to return withdrawn or amended proposals.

CCAB Membership

If awarded the contract, the Bidder must become a CCAB member at their own expense unless they are already a current CCAB member. For more information: <https://www.ccab.com/membership/join-and-renewal/>.

SUBMISSION DEADLINE

All proposals are due by **5:00 p.m. EST on Friday June 16, 2023**. Any late proposals will not be evaluated.

Item	Date
1. RFP distribution to bidders	June 2, 2023
2. Proposal submission due	June 16, 2023
3. Final bidder selection	June 30, 2023
4. Announcement of successful bidder(s)	July 4, 2023
5. Kick-off Meeting with Brand Advisory Committee	W/o July 17, 2023

GUIDELINES FOR PROPOSAL PREPARATION

All materials submitted in response to the RFP become the property of CCAB and will not be returned. Proposals are submitted at the sole expense of the sender. It is the applicant's responsibility to secure proof that his/her proposal has been received by the CCAB within the prescribed time limit.

The submitted proposals are to include each of the following sections:

- Appendix A - Submission with References & Experience in Similar Projects
- Appendix B - Proposal and Budget
- Appendix C - Value-Added Bid Enhancements
- Appendix D - CCAB Participation

EVALUATION AND AWARD PROCESS

The proposals are evaluated by the CCAB President & CEO and those with a vested interest and involvement in the selection including available members of the CCAB Brand Advisory Committee. All proposals are subject to a comprehensive analysis and evaluation, based upon the best overall value to CCAB. CCAB intends to retain the successful Bidder pursuant to a “Best Value” basis, not a “Low Bid” basis. For CCAB to properly evaluate the proposals received, all proposals submitted must be formatted in accordance with the sequence noted above. All bids will be graded based on the following criteria:

- Cost (40) – Appendix B
- Work Samples (30) – Appendix B
- Experience in Similar Projects (15) – Appendix A
- References (5) – Appendix A
- Value Added Bid Enhancements (10) – Appendix C
- **TOTAL: 100 points (converted to a percent)**
- Bonus Participation Points (15) - Appendix D

APPENDIX A – Submission with References & Experience in Similar Projects (20 pts)

CCAB reserves the right in its discretion to negotiate modifications to any proposal received without becoming obligated to offer to negotiate with any other vendor(s).

NAME AND CONTACT INFORMATION OF AUTHORIZED REPRESENTATIVE(S):

COMPANY NAME	
SUBMITTED BY:	
POSITION	
TELEPHONE #	
EMAIL:	
WEBSITE:	

BRIEF BIOGRAPHY/RESUME OF COMPANY (Please use the space below or attach a brief biography/resume of company.)

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REFERENCES: *Please provide details on 2 relevant clients that you have worked with*

Reference #1

NAME	
COMPANY	
POSITION:	
TELEPHONE #	
EMAIL:	
PROJECT LINKS IF AVAILABLE	

Reference #2

NAME	
COMPANY	
POSITION:	
TELEPHONE #	
EMAIL:	
PROJECT LINKS IF AVAILABLE	

I/We _____ the undersigned HEREBY DECLARE AND ACKNOWLEDGE:

THAT I / WE have examined the documentation and information contained in this RFP and its appendices, and acknowledge the requirements and conditions contained therein.

THAT I / WE are compliant with the conditions contained in the RFP.

THAT all statements in this proposal are true and accurate in all respects.

THAT full disclosure has been made of any conflict of interest or potential conflict of interest.

THAT I / WE do hereby offer to enter a contract to do all the work as described in the RFP and to complete the work to the full and complete satisfaction of CCAB for the sum bid.

THAT my/our submission is irrevocable after close of bidding for a period of not less than thirty (30) calendar days from that date.

THAT the undersigned are duly authorized to execute this proposal on behalf of:

Name of Vendor: _____

Authorized Signature: _____

Contact Telephone # _____

Dated at _____
City / Province

This _____ Day of _____, 2023

Please submit in PDF format. Proposals are not accepted after the deadline. Any questions concerning requirements, contractual terms and conditions, or proposal format must be directed to the contact person listed below.

APPENDIX B – Fee Proposal (40 pts)

The authorized representative (signed in Appendix A) has carefully examined the information attached hereto, is fully informed as to CCAB’s requirements, and is prepared to submit the following price quotations:

Bidders can use the financial breakdown below or submit their own version which should include all major deliverables.

Phases	Deliverables	Proposed Fee	Charitable Discount (If Appendix C-2 applies)
Recommendations and Planning	<ul style="list-style-type: none"> • Initial evaluation of scope of project as well as effectiveness of current brand/sub-brands. • Provide a summary report of risks and risk mitigation efforts, including to the organization itself as well as for stakeholders and members. • Provide a report regarding recommended next steps, timelines and budget requirements. • Provide a marketing/communications plan for communicating the brand refresh. • Host virtual/in-person (to be determined) session with CCAB President & CEO and CCAB Brand Refresh Advisory Committee to discuss the findings and above reports and determine next steps and receive approvals. 		
Development	<ul style="list-style-type: none"> • Presentation of creative concepts for brand/sub-brand refreshes (no less than three options). 		

<p>Completion and Execution</p>	<ul style="list-style-type: none"> • Brand/Sub-brand Development: new brand and sub-brand names (English and French); brand positioning; brand narrative; topline key messages. • Brand/Sub-brand Identities and relationships: logos (English and French); colour palette; guidelines on look and feel; fonts and typography; guidelines on imagery selection. • Brand Relationships: recommended strategy on the overarching brand and sub-brands; align all brand logos and brand identities; recommend how they interact and relate. • Asset Development: brand guidelines; PPTs; e-signatures; others TBD through brand/sub-brand refresh process. • Website: recommendations on website strategy between brand and sub-brands. • Launch: Provide recommendations and support on rollout and launch strategy. 		
<p>Total Proposed Budget</p>			

Proposed Invoicing/Payment Schedule

If applicable, provide a proposed payment schedule for the project.

APPENDIX C – Value-Added Bid Enhancements (5 pts each)

- 1. Have you worked with CCAB before? YES NO
 - a. If yes, describe: _____

- 2. Do you offer a charitable discount? YES NO
 - a. If yes, describe: _____

APPENDIX D – CCAB Participation (Additional points)

- | | | | | |
|------------------------------------|-----|--------------------------|----|--------------------------|
| 1. Indigenous Business (5 pts) | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 2. CAB member (5 pts) | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 3. PAR Program Participant (5 pts) | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |

CCAB CONTACT:

Ashley Robin, Council for Aboriginal Business
Email: arobin@ccab.com