



## **REQUEST FOR PROPOSAL CGLCC Brand Identity Project**

### **ISSUE DATE AND TIME**

31 January 2024

### **CLOSING DATE AND TIME**

13 February 2024 at 5pm Eastern Standard Time.

### **CONTACT**

Sarah Evalina, Chief Operating Officer

[sarah@cglcc.ca](mailto:sarah@cglcc.ca)

Bidders are advised to read and respond appropriately to all sections of the Request for Proposal (RFP). Bidders unable to provide all services described herein need not bid.

Canada's 2SLGBTQI+ Chamber of Commerce will not accept proposals from bidders with a real or perceived conflict of interest.

# Background

## Canada's 2SLGBTQI+ Chamber of Commerce

Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) is a national not-for-profit organization dedicated to expanding the economic opportunities and advancements of the 2SLGBTQI+ business community and to advocating on behalf of an estimated 100,000 2SLGBTQI+ owned businesses in Canada, as well as 2SLGBTQI+ professionals, students of business, allies, and ally organizations.

The CGLCC's core mission is to enable the 2SLGBTQI+ business community to grow through advocacy, education, capacity building and connections, in partnership with allies who share our vision. We engage in this work through a number of channels, such as supplier diversity programming and certification, expanding global trade opportunities, and young entrepreneur mentorship.

More information on the organization can be found on our website: [cglcc.ca](http://cglcc.ca).

## Project Overview and Objectives

CGLCC is seeking an experienced brand and design agency to support the redesign and redevelopment of the CGLCC's brand identity. Our recent 20-year anniversary, coupled with a major organizational scale-up has prompted the need to review and revise our current brand identity, from name and logo to visual identity and tone of voice. The outcomes of the project should guide us toward a brand identity that is in closer alignment with the organization's vision, mission, and values—namely, alignment with the Federal 2SLGBTQI+ Action Plan and greater inclusion for all 2SLGBTQI+ communities.

To speak to our recent scale-up, the CGLCC was [recently tasked with administering the first-ever 2SLGBTQI+ Entrepreneurship Program](#). Expansion of our services and programming requires additional programmatic sub-branding and consideration towards expansion in addition to current functionality.

The CGLCC is seeking an agency partner to assist with this project, with key consideration given to the following areas:

- Market analysis and reporting before, during, and after project
- Name change evaluation and recommendations
- Brand and wordmark change evaluation and recommendations
- Updated visual identity, including an updated print and digital style guide
- Voice and tone guidelines for ongoing use
- Implementation support, post-development

We will require a communications plan to be developed alongside the brand identity project and rollout. While not a requirement of the scope of work, if your agency is suited to deliver on a communications plan that would speak to audience engagement and awareness in relation to the brand's rollout, please outline the scope, budget, and deliverables in your proposal.

## **Key Audiences**

CGLCC's main audiences include current and prospective:

- Certified Suppliers
- Corporate Members
- Donors and Funders
- Community organizations and academic institutions

## **Scope of Work**

### **Phase 1: Research & Recommendations**

#### **1. Brand Strategy Review & Refinement**

- a. Lead internal working sessions to gather and consolidate information regarding CGLCC's vision, mission, and values, market positioning, brand guidelines, program offerings, noting gaps and/or inconsistencies
- b. Review and understand current and legacy organizational and program naming; navigate and solicit feedback on the relationship between CGLCC's current brand identity and potential barriers to inclusion for members of equity-deserving groups
- c. Lead audience interviews and/or surveys to determine the current awareness and perception of the CGLCC brand and its programming and key audiences segments, particularly focused on current and potential 2SLGBTQI+ suppliers
- d. Lead a landscape scan to determine CGLCC's market positioning, competitors, perception and awareness in various public, corporate, government, and community segments
- e. Lead an exercise to hone in on CGLCC's go-forward brand personality and/or archetype, to support decision making in name and visual direction, as well as voice, tone, and brand behaviour

#### **2. Name Change Evaluation**

- a. Perform a combination of primary and secondary research to develop two to four (2-4) alternative names for internal review and market testing, with consideration given to English and French translations, if/where required
- b. Perform an initial copyright and trademark search to ensure alternative name options are available on an internal level
- c. Recommend a new web domain for each alternative name
- d. Recommend taglines and/or slogans for the organization and its related programs, as required

- e. Recommend name changes to any ancillary programs, as required and/or permitted
- f. Perform market testing of the alternative names, including at least three focus groups with various key audiences, as listed above

### **3. Visual Identity Evaluation**

- a. Perform research to determine the current performance of CGLCC's visual identity with key audiences, namely 2SLGBTQI+ suppliers and entrepreneurs
- b. Create 2-4 visual identity options (mood boards or similar) to modernize the CGLCC's relevance and connection to these key audiences. Include high level recommendations regarding use of animation, illustration, photography, videography, and other relevant forms of media

## **Phase 1 Deliverables**

- Research summary and recommendations, detailing CGLCC's current brand perception, gaps and opportunities, and recommendations specific to improving engagement with members of equity-deserving groups including trans and BIPOC communities
- Finalized brand personality and/or archetype, with guidelines for use
- 2-4 alternative name recommendations and considerations for CGLCC's review and approval
- 2-4 visual identity mood board recommendations and considerations for CGLCC's review and approval
- *Optional: Communications Plan*

The completion of Phase 1 will be marked by CGLCC stakeholders approving an alternative name and selecting a visual identity direction.

## **Phase 2: Brand Identity Development**

### **1. Logo Design**

- a. Create a primary logo, secondary logo, wordmark, submarks, and icons
- b. Create relevant sub-identity logo treatment for various programs and offerings

### **2. Visual Identity**

- a. Further develop the chosen visual identity, including
  - i. a robust style guide including colour palettes, font and typography, imagery and iconography, for both print and digital media
  - ii. 5-8 ready-for-use assets, such as letterhead, presentation template, business cards, print ad, digital ad, etc.
  - iii. Initial suite of brand imagery (illustration, animation, imagery, and/or videography)
  - iv. Recommendations additional imagery for future marketing and communications in line with the new brand

### **3. Brand Voice**

- a. Create overarching guidelines and recommendations for CGLCC's brand tone and voice, as related to the identified brand archetype, name, visual identity, and key audiences
- b. Provide recommendations on CGLCC's tone and voice as to be more understanding of, and appealing to, equity-deserving communities that have been

identified as underserved audiences

#### 4. **Brand Guidelines**

- Document requirements and recommendations for brand implementation and use for both CGLCC staff and media partners

#### **Phase 2 Deliverables**

- Logo suite
- Style guide
- 5-8 designed assets
- Voice and tone guidelines
- Brand guidelines

Completion of Phase 2 will be marked by CGLCC's receipt and approval of all Phase 2 Deliverables.

### **Project Timeline**

The Project's anticipated start date is March 1, 2024. Phase 1 is expected to be completed by May 31, 2024, with Phase 2 completed by October 31, 2024. The new brand identity is expected to be in use in early 2025.

### **Project Budget**

The project has a budget range of approximately \$70,000-95,000 CDN (excluding HST) over the period of the contract. This includes all third party or administration fees as well as any travel or incidentals that may be proposed as part of the project. We are open to receiving proposals that might be slightly lower or higher than the given range depending on the complexity of the proposal and the activities proposed.

### **Minimum Requirements for the Bidder**

The bidder should demonstrate that they:

1. Have expertise and experience in conducting research and leading consultative processes with 2SLGBTQI+ communities, equity deserving groups, including Two Spirit, Indigenous, trans, and BIPOC members of the 2SLGBTQI+ community
2. Have experience working on and with 2SLGBTQI+ related projects
3. Have significant experience completing brand identity projects for organizations of similar scale and scope, through a time of transition
4. Have experience working with bilingual audiences, and producing bilingual assets; or the capacity to do so as outlined in this proposal
5. Are able to meet the requirements of the project as described in this Request for Proposal; and
6. Are able to complete all work by October 31, 2024

### **Proposal Submission Guidelines**

Proposals must address the following, in addition to any other information you wish to provide:

1. **Equity & Anti-Oppression:** Share information and examples of how your organization approaches equity and anti-oppression in your internal systems and external

- engagements
2. **Team:** Detail the roles and team members that will be assigned to this project as well as their experience applying an EDI lens to their work; include the tenure of team members assigned to this project, alongside the total number of in-house staff
  3. **Work Plan:** Outline your approach to each phase of the project, noting the overall timeline and key milestones
  4. **Work Experience:** Describe experience completing brand identity projects for nonprofit organizations and/or organizations serving equity-deserving communities
  5. **Budget:** Detail your proposed pricing structure and standard billing rates, including any non-profit discounts available.
  6. **Communication & Workflow:** Describe what tools your team will use to communicate with CGLCC, and your general project management process.
  7. **Case Studies & References:** Provide three (3) case studies and corresponding references of past similarly-scoped projects

Proposals are not to exceed 20 pages.

## Proposal Evaluation

Proposals will be evaluated by a selection committee representative of CGLCC staff. A vendor will be chosen based on a bidder's response to the enclosed service requirements and evaluated according to the criteria listed below:

### Agency Evaluation (45%)

- Overall capabilities based upon understanding of project scope and activities
- Qualifications and experience as outlined in the minimum requirements of bidder
- Demonstrated experience working with equity-deserving communities and organizations serving equity-deserving groups beyond the scope of the 2SLGBTQI+ community
- Team member qualifications

### Proposed Work Plan (45%)

- Understanding of project, including clarity and relevance of proposal
- Proposal preparation, thoroughness, and responsiveness to requirements of RFP
- Quality of the approach to the project and the work plan
- Outline of deliverables and how they will be met
- Identification, explanation, and justification of modified tasks and/or unique challenges expected

### Certified Diverse Supplier (5%)

- Bidder is a certified Diverse Supplier with Canada's 2SLGBTQI+ Chamber of Commerce or other recognized certification body.

### Estimation of Project Costs (5%)

- Budget allocations should be commensurate with level of activity in the workplan and reflect value for effort

Interviews will be conducted with shortlisted candidates the week of February 19th. CGLCC reserves the right to schedule a shorter follow-up meeting with the finalist candidate(s).

Any questions or clarifications can be directed to Sarah Evalina, Chief Operating Officer at [sarah@cglcc.ca](mailto:sarah@cglcc.ca).

Questions or clarifications subject line must be “**Questions for CGLCC Brand Identity Project**”.

Proposals must be submitted in English, in PDF format, to [sarah@cglcc.ca](mailto:sarah@cglcc.ca) no later than **February 13, 5:00 pm EST**.

Proposal subject line must be “**Proposal for CGLCC Brand Identity Project**”.

CGLCC will notify all bidders upon receipt of their proposal, in the form of an email. CGLCC is not responsible for bids that fail to meet this deadline.

## Key Terms of Engagement

Although not exhaustive, this list of key terms of engagement will become an integral part of the Agreement between the CGLCC and the successful bidder.

Acceptance of the Proposal: CGLCC reserves the right not to accept any proposal. The RFP should not be construed as a contract to purchase services. CGLCC shall not be obligated in any manner until a written agreement relating to an approved proposal has been duly executed.

Proposal Revisions: Proposal revisions must be received prior to the RFP submission/closing date and time.

Financing of Proposals: The cost associated with preparing and submitting proposals will not be paid by CGLCC.

Acceptance of RFP Conditions: Receipt of proposal offer will be considered acceptance of the RFP terms and conditions by the bidder.

Subcontracting: Subcontracting may be allowed in specific instances, but must be previously approved in writing by CGLCC.

Project Contact: CGLCC will assign a lead project contact when the contemplated contract is awarded. The successful bidder will also assign a lead project contact at that time.

Negotiation Delay: If a written contract cannot be concluded within fifteen days of notification to the designated bidder, CGLCC may, in its sole discretion, terminate negotiations with that bidder, and either negotiate a contract with another bidder of its choice or choose to terminate the RFP process and not enter into a contract with any of the bidders.

Proposals as Part of Contract: Proposals may be negotiated with bidders and, if accepted, form part of any contract awarded.

Disclaimers/Limitations of Liability: Neither acceptance of a proposal nor execution of an agreement shall constitute approval of any activity or development contemplated in any proposal that requires any approval, permit, or license pursuant to any federal, provincial, regional district or municipal statute, regulation, or by-law. It is the responsibility of the

contractor to obtain such prior to commencement of the services under the proposed contract.

Copyright: During the project period, the successful bidder shall not sell, transfer, mortgage, lease, or otherwise dispose of any tangible or intangible assets including any intellectual property purchased for Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) under the contracted agreement without prior written consent of the owners. The copyrights, trademarks, and any other intangible or tangible rights relating to the Underlying Works belong to CGLCC and shall be delivered forthwith to CGLCC upon completion of the particular project, or as otherwise requested by CGLCC.

CGLCC reserves the right to modify the conditions of the RFP, at any time up to the closing date and time.

## **Confidentiality and Security**

Other Purpose: This document or any portion thereof may not be used for any purpose other than the submission of proposals.

Security and Privacy of Information: The successful bidder must agree to comply with the CGLCC Privacy Policy regarding information received from participants in industry consultation activities. These include strict control of access to data and maintaining confidentiality of information gained while carrying out their duties under the terms of any contract.

Disclosure: All documents submitted by bidders shall become the property of CGLCC, and as such will be subject to the disclosure provisions of the Freedom of Information and Protection of Privacy Act. Information pertaining to CGLCC obtained by the bidder as a result of participation in this project is confidential and must not be disclosed. Samples of work provided as part of submission requirements remain property of the bidder.

CGLCC, ITS EMPLOYEES, AGENTS, AND CONSULTANTS EXPRESSLY DISCLAIM ANY AND ALL LIABILITY FOR REPRESENTATIONS, WARRANTIES EXPRESSED OR IMPLIED OR CONTAINED IN, OR FOR OMISSIONS FROM THIS RFP PACKAGE OR ANY WRITTEN OR ORAL INFORMATION TRANSMITTED OR MADE AVAILABLE AT ANY TIME TO A BIDDER BY OR ON BEHALF OF CGLCC. NOTHING IN THIS RFP IS INTENDED TO RELIEVE BIDDERS FROM FORMING THEIR OWN OPINIONS AND CONCLUSIONS IN RESPECT TO THIS RFP.