



Town of
**SOUTH BRUCE
PENINSULA**

REQUEST FOR PROPOSAL

ED01-11

CONSULTING SERVICES

**For the Preparation of a Community-Based Strategic Plan (CBSP)
for the Town of South Bruce Peninsula.**

Closing Date: 2:00 P.M, June 17, 2011

REQUEST FOR PROPOSAL

ED01-11

CONSULTING SERVICES

Respondents are required to provide three (3) copies of the Proposal in a sealed, clearly marked envelope, including the prescribed form(s) as instructed. Proposals are to be delivered to Danielle Mulasmajic, EDO, Town of South Bruce Peninsula, Box 310, 315 George St., Wiarton, Ontario, N0H 2T0, no later than 2:00 P.M. LOCAL TIME on **Friday, June 17, 2011**.

The goal of this Request for Proposal is to select the best professional team to provide leadership, experience and project management for the preparation of a Community-Based Strategic Plan (CBSP) for the Town of South Bruce Peninsula, hereby referred to as the "Town".

All submissions should provide sufficient information to permit the Town to reach an accurate assessment of the quality of the submission.

A Selection Committee will evaluate the Request for Proposals based on a combination of qualifications and budget (refer to evaluation criteria).

Proposal submissions will include a detailed description of the work plan, qualifications, staff work hours allocation summary and related information as well as a description of detailed consulting fees for the staff work hours allocated for the project.

The Town is not liable for any cost associated with the preparation of the Proposal or any other costs incurred by any Proponent prior to the execution of the contract.

Proposals received after the deadline, whether delivered personally, or by mail, regardless of postal markings, will not be opened. Fax or electronic (email) submissions will not be accepted. The onus is on the respondent to ensure that the Proposal is received in the proper location and before the closing time.

Documents may be obtained from the Town of South Bruce Peninsula, Box 310, 315 George St., Wiarton, Ontario, N0H 2T0 or Proponents may choose to have a PDF document emailed. Please contact Danielle Mulasmajic, EDO at 519-534-1400, Ext. 123 or ecodevelopment@southbrucepeninsula.com to arrange for the Request for Proposal document.

1.0 INSTRUCTIONS TO PROPONENTS

1.1 Communications

All questions relating to this Request for Proposal, or for clarification on completing the Proposal Form, are to be directed in a letter or an email to:

Danielle Mulasmajic, EDO
Town of South Bruce Peninsula
Box 310, 315 George St., Wiarton, ON
N0H 2T0
Tel: (519) 534-1400 Ext. 123
ecodevelopment@southbrucepeninsula.com

The DEADLINE for all queries or questions is **12:00 P.M., June 15, 2011**. If required, addenda will be issued.

It shall be understood and acknowledged that while this RFP includes specific requirements and specifications, minor items or details not herein specified, but obviously required for the Project shall be provided as if specified in conformance with modern practices. Any omission or errors or misinterpretation of these requirements and specifications within the Proposal shall not relieve the Proponent of the responsibility of providing the goods or services as aforesaid.

Proposal shall mean this Request for Proposal and any/all addendum/addenda, completed and returned in accordance with the foregoing, together with all other documents required herein. If a Proponent discovers any inconsistency, discrepancy, ambiguity, error or omission in this Request for Proposal, he/she must notify the Town immediately in writing. It is the responsibility of the Proponent to seek clarification of any matter that they consider unclear before submitting a response. The Town is not responsible for any misunderstanding of the Request for Proposal on the part of the Proponent.

No oral interpretations shall be made to a Proponent as to the meaning of any of the Proposal requirements, or be effective to modify any of the provisions of the proposal document.

No representative of the municipality, its employees, agents, or any other expert advisor associated with the Proposal shall be contacted by the Proponent during the preparation of their response to the Request for Proposal except as noted above. Any attempt to influence the evaluation and selection process may result in immediate disqualification of the Proponent. Any attempt to bypass the purchasing process is grounds for rejection of the Proponent's submission.

1.2 Anticipated Schedule

RFP issued	June 2, 2011
Deadline for questions	June 15, 2011
Closing Date	June 17, 2011
Council Meeting – Recommendation of Award	July 12, 2011
Project Commencement	July, 2011

1.3 Proposal Submissions

Sealed Proposals (three copies), in clearly marked envelopes including the prescribed form(s) as instructed, are to be delivered to: ATTN: Danielle Mulasmajic, EDO, Town of South Bruce Peninsula, Box 310, 315 George St., Wiarton, Ontario, N0H 2T0, no later than 2:00 P.M. LOCAL TIME **June 17, 2011**.

Proposals received after the scheduled closing date and time will not be accepted. The Town is not obligated to accept the lowest price, highest scored or any Proposal.

Proposals that do not comply strictly with the terms and conditions hereof may be declared informal and/or disqualified. Proposals that are incomplete, conditional, obscure or qualified will be rejected.

Your signed Proposal Submission shall be taken as your statement that you understand the requirements and agree to comply with the requirements and any supplementary terms and conditions stated in the Proposal Documents. Your signed Proposal Submission confirms that you have checked and confirmed your pricing and by signing the Proposal Submission form, you agree that you have not omitted any items from your Proposal and you will be bound by law to supply the services as specified at the prices proposed.

If a Proposal is a joint submission of two (2) or more consulting firms, a single proposal is to be coordinated and submitted by the lead consultant with the required information. However all contributing consulting firms shall be noted in the submission as noted herein.

To facilitate the review and evaluation of the proposals, all proposals shall include, as a minimum, the following:

- a) A detailed work program and time schedule, including an anticipated completion date, and a description of the major activities to be undertaken during the course of the Project to meet the study objectives as identified by the terms of reference;
- b) A company profile describing the relevant experience of the firm on projects of comparable size and complexity;
- c) An outline that describes your project approach, methodology and proposed work stages;
- d) An outline of the principals and staff of the firm who will be directly responsible for carrying out the Project, including their level of responsibility and the estimated amount of time that each individual will spend on the project. The outline should further define the qualifications, availability, and relevant experience, along with per diem rates for each member of your team;
- e) Identification of all sub-proponents or partners to be used in completing the work assignment. The proportion of the project budget allocated to the sub-proponents must be provided. For each sub-proponent, the proposal must indicate the staff to be assigned to the project, their qualifications and relevant experience on comparable projects and estimate of time to be spent on the project, their per diem rates for the study;
- f) An upset fee for the total project, including all expected disbursements and all applicable taxes;
- g) A schedule of fees broken down by components (phases, activities or items) in relation to the work/time schedule;
- h) An outline of the data and other information that the Proponent expects the Town to provide;



- i) A list of clients, including contact persons, for whom the project team has, within the past five years, carried out or is in the process of carrying out, project management work similar to that outlined in the scope of work described herein;
- j) An acknowledgment that all submissions, once received by the Town, shall become the property of the Town and will not be returned.

1.4 General

Failure to comply with any of the requirements of any and all of the Request for Proposal Call may cause a Proponent to be declared improper and therefore rejected. By submitting a Proposal, the Proponent agrees to the conditions herein.

1.5 Intent

The Town of South Bruce Peninsula is seeking proposals from qualified Proponents to assist with the preparation of a Community-Based Strategic Plan (CBSP) for the Town of South Bruce Peninsula.

The successful Proponent will provide at its sole cost and expense, all staff, equipment, goods, materials, tools, resources, accommodations, and technical assistance and any incidentals and assume all overhead expenses necessary to perform the services required in accordance with the work outlined herein. The Town of South Bruce Peninsula reserves the right not to enter into an agreement due to the lack of availability of funding.

1.6 Receipt of Submissions

Proponents shall be solely responsible for delivery of their Proposals in the manner and time described in the Instructions to Proponents. Fax and electronic submissions will NOT be accepted.

1.7 Withdrawal

Proponents may only withdraw their unopened submission (prior to the closing time of proposals) provided the request to do so is received in writing by the Designated Official of the Town, signed by an authorized agent of the Proponent, prior to the closing time specified for the receipt of Proposals. If more than one Proposal has been received under the same name for the same project and no withdrawal notice has been received, the submission contained in the envelope bearing the latest date and time stamp shall be considered the intended Proposal. All others shall be considered withdrawn.

1.8 Designated Official

For the purpose of this Proposal, Tender or Quotation, the Chief Administrative Officer (CAO) or designate, is the "Designated Official" and shall perform the following functions - releasing, recording and receiving all Proposal Documents; opening, recording and checking of Proposals; considering extensions of time, ruling on the acceptance of those Proposals not completely meeting the requirements of this Request for Proposal. If necessary Town staff will prepare a report and recommendations to Council as required by the Purchasing By-law.

1.9 Pricing and Taxes

- (a) Prices shall be in Canadian Funds, quoted separately for each item if stipulated
- (b) Prices shall be firm for the duration of the Contract
- (c) The Proposal Price must include all incidental costs and the Proponent shall be deemed to be satisfied as to all the full requirements of the Request for Proposal call
- (d) All prices quoted shall include all charges of every kind attributable to the Project
- (e) SALES TAX- All applicable taxes will be considered to be included in the Proposal price submitted by the Proponent; H.S.T shall be stated separately as set out in the Financial Proposal
- (f) Any extra charges not specified will not be paid

1.10 Discrepancies

Should a Proponent find discrepancies prior to the closing date or omissions from the Documents, or is in doubt as to their meaning, such Proponent should notify the CAO or designate as soon as possible but no later than **12:00 P.M. on June 17, 2011**. The Town will issue in writing any changes/additions/deletions to specifications, terms of reference, scope of work and/or Proposal terms and conditions. Any and all addendum/addenda issued prior to the closing date shall form part of the document. The cost of complying with the addendum/addenda requirement (if any) shall be included in the price. The Town will assume no responsibility for oral instruction or suggestion.

1.11 Approvals / Acceptance / Award

All Proposals as described herein are subject to the approval of the Town as required under the Purchasing By-Law. The award shall also be subject to the approval of Council and the availability of funding. The Proposal is irrevocable and open for acceptance by the Town for a period of ninety (90) calendar days after the date and time set for submission of Proposals. The Town may at any time within the above ninety (90) calendar day period accept the Proposal, whether or not any other Proposal has previously been accepted. Neither the issuance of this Document nor the acceptance of a reply shall constitute any obligation or imply any commitment on the part of the Town. Award of this Proposal call shall be as recommended by Town staff and as approved by Council. In the evaluation of Proposals, it is understood by the Proponent that the Town reserves the right to accept or reject any or all Proposals, in whole or in part, for any reason whatsoever, and to accept any Proposal if, upon evaluation analysis, it is considered to be in the Town's best interest. Award of the contract in its entirety or in part shall be in accordance with Town requirements.

1.12 Reserved Rights of The Town

The Town reserves the right, in its sole discretion, to:

- a) issue an award for the work in whole or in part, or
- b) refrain from making an award if it determines that to be in its best interest, or not make an award to the highest scored compliant Proponent, or any Proponent, if it is determined by the Town that the costs of completing the work exceeds budgetary constraints.
- c) make public the names of any or all Proponents;
- d) reject a Proponent's Proposal on the basis of
 - a financial analysis determining the actual cost of the Proposal when considering factors including but not limited to quality, service, price and transition costs arising from the delivery of the required services;



- information provided by references;
 - the Proponent's past performance on previous contracts awarded by the Town;
 - the information provided by a Proponent pursuant to the Town exercising its clarification rights under this Request for Proposal (RFP) process; or
 - other relevant information that arises during the RFP process;
- e) waive formalities and accept Proposals which substantially comply with the requirements of this RFP;
 - f) check references other than those provided by a Proponent;
 - g) disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information, or any qualifications;
 - h) disqualify any Proponent or the Proposal of any Proponent who has engaged in conduct prohibited by this RFP;
 - i) make changes, including substantial changes, to this RFP provided that those changes are issued by way of addenda in the manner set out in this RFP;
 - j) cancel this RFP process at any stage;
 - k) cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables;
 - l) accept any Proposal in whole or in part;
 - m) if a single Proposal is received, reject the Proposal of the sole Proponent and cancel this RFP process or enter into direct negotiations with the sole Proponent; or
 - n) reject any or all Proposals in its absolute discretion.

These reserved rights are in addition to any other expressed rights or any other rights which may be implied in the circumstances. The Town shall not be liable for any expenses, costs or losses suffered by any Proponent or any third party resulting from the Town exercising any of its expressed or implied rights under this RFP.

1.13 Errors & Omissions

It is understood and acknowledged that while the Request for Proposal includes specific requirements, a complete review and recommendation is required. Minor items, not herein specified, but obviously required, shall be provided as specified. Any misrepresentation of the requirements within this Proposal shall not relieve the successful Proponent of the responsibility of providing the services/products as aforesaid.

1.14 Qualifying of Proposals

Proponents are cautioned against qualifying their submissions in any manner whatsoever as this may result in their Proposal being rejected.

1.15 Waiver

The Town does not accept responsibility for any information or any errors or omissions which may be contained in this Request for Proposal or the data, materials or documents disclosed or as provided to the Proponents pursuant to this Request for Proposal. The Town makes no representation or warranty, either expressed or implied, in fact or in law with respect to the accuracy or completeness of this Request for Proposal or such data, materials or Documents and the Town shall not be responsible for any actions, costs, losses or liability whatsoever arising from any Proponent's reliance or use of this Request for Proposal or any other technical or historical data, materials or documents provided by The Town. The Proponent is responsible for obtaining its own independent financial, legal, accounting and technical advice

with respect to any information included in the Request for Proposal or in any data, materials, or documents provided or required by the Town.

1.16 Conflict of Interest

The Proponent shall provide a statement that clearly identifies that the Proponent has no conflicts of interest with respect to other work and/or other clients as they relate to the Town.

1.17 Legal Claims

The Town reserves the right in the appropriate circumstances, to reject any quotation, any bid, any Proposal if the Proponent/bidder, or any officer or director of the Proponent/bidder, is engaged, either directly or indirectly through another corporation, in a legal proceeding adverse to the Town, its elected or appointed officers and employees.

The term “legal proceedings adverse to the Town” is limited to:

- criminal prosecution proceedings to enforce Town by-laws or to enforce contraventions in the Town of other applicable legislation, or
- civil proceedings where a statement of claim or counterclaim or cross claim or other similar document has been issued against the Town.

Proponents/Bidders will be required to demonstrate that they are in compliance with the requirements of any applicable authority which is licensing, regulating or approving the activities which relate to the tender, request for proposal or quotation.

1.18 Disqualification of Proponents

More than one Proposal from an individual firm, partnership, corporation or association under the same or different names will not be considered unless the Proposal shall be supplied under a “joint” agreement and so declared on the Proposal submission.

1.19 No Collusion

In participating in this Request for Proposal, the Proponent will not discuss or communicate, directly or indirectly, with any other Proponent or any servant, agent or representative thereof, respecting the preparation or presentation of their Proposal. Each Proponent’s Proposal shall be submitted without any connection, knowledge, comparison of figures or arrangements with any other Proponent or servant, agent or representative thereof and each Proponent will be responsible to ensure that its participation in this process is conducted fairly and without collusion or fraud.

1.20 Freedom of Information

All information supplied to the Town becomes the property of the Town and is subject to the provisions of the *Municipal Freedom of Information and Protection of Privacy Act*. Please note the name and contact information of each Proponent, along with the total Proposal amount will be made public. Disclosure of any other information will be made in accordance with the Act. The Proponent must identify any information in its Proposal that is submitted in confidence.

1.21 Environmental Purchasing

The Town is committed to the principles of sustainable development and will, wherever practical, apply environmentally sound practices in fulfilling its mandate in the planning and provision of materials, services and programs. Proponents are encouraged to adopt and promote environmentally sound practices in and introduce environmentally sound goods, materials and services when dealing with the Town.

1.22 Misunderstandings and Disputes

In all cases of misunderstandings and disputes, verbal arrangements will not be considered, but the Proponent must produce written authority in support of their contentions, and shall advance no claim in the absence of such written authority, or use, or attempt to use, any conversation with any parties against the Town or in prosecuting any claim against the Town.

1.23 Cancellation

Failure by the successful Proponent to comply with all terms, conditions and general provisions of this Request for Proposal to the satisfaction of the Town shall be just cause for the cancellation of the Contract award. The Town shall then have the right to award this Contract to any other Proponent, or to re-issue the Request for Proposal.

1.24 Default

In the event that the successful Proponent fails to properly, promptly, and fully carry out the work required by these Documents, the Town reserves the right to notify the successful Proponent to discontinue all work

under this Contract, to advertise for new proposals or carry out the work in any way as the Town may, at its sole discretion, deem best.

1.25 Indemnification

(a) The Proponent will indemnify and save harmless the Town, its employees, agents, successors, and assigns, from and against all actions claims and demands whatsoever which may be brought against or made upon the Town and against all losses, liability, judgments, claims, costs, demands or expenses which the Town may sustain, suffer, or be put to resulting from or arising out of the Proponent's failure to exercise reasonable care, skill or diligence in the performance or rendering of any work or service required hereunder to be performed or rendered by the Proponent.

(b) Without limiting the generality of the foregoing, the Proponent hereby agrees to well and truly save, keep harmless and fully indemnify the Town, its employees, agents, successors and assigns, from and against all actions, claims and demands whatsoever which may be brought against or made upon the Town, its successors and assigns, for the infringement of or use of any intellectual property rights including any copyright or patent arising out of the reproduction or use in any manner of any plans, designs, drawings, specifications, information, negatives, data, material, sketches, notes, documents, memoranda, or computer software furnished by the Proponent in the performance of this contract.

1.26 Claims and Costs

All costs and expenses incurred by the Proponent relating to the Proposal submission and any negotiations with the Town will be borne by the Proponent. The Town is not liable to pay such costs or expenses or reimburse or compensate Proponents under any circumstances, including the rejection of any or all other Proposals. The Town will not accept responsibility for any delays or costs associated with any review or the approval process. No Proponent shall have any claim for any compensation of any kind whatsoever as a result of participating in this Request for Proposal and by submitting a Proposal, the Proponent shall be deemed to have agreed that it has no claim. The Proponent hereby releases and waives any claims for damages, including any claims for damages for fundamental breach, relating to this Request for Proposal.

1.27 Ownership of Submission of Material

The Proponent (by responding) releases all rights to the Proposal which, on acceptance by the Town, become the property of the Town.

1.28 Non-Assignment

It is mutually agreed and understood that the successful Proponent shall not assign, transfer, convey, sublet or otherwise dispose of their Contract/Agreement or their right, title or interest therein, or their power to execute the Contract/Agreement, to any other person, firm, consultant or corporation without the previous written consent of the Town.

1.29 Subcontractors

Since all Proponents must be qualified and experienced in this type of work, it will be necessary for the Proponent to verify that its sub proponents are similarly qualified and experienced in their specified area of work. Therefore, the Proponent is required to submit a list of sub proponents for approval. Only those sub proponents named and approved at time of order may be used. Approval of sub proponents is at the sole discretion of the Town.

The successful Proponent shall be responsible to the Town for the acts and omissions of its sub proponents and of all persons directly or indirectly employed by it in connection with the work and shall be responsible for and shall ensure they obtain all necessary permits, licences, certificates, inspections and insurance in accordance with the work as may be required by laws, rules, regulations and codes related to the work and the contract documents. Nothing contained in the contract documents shall create any contractual relation between any sub proponent and the Town.

The Town reserves the absolute right to require the Proponent to use an alternate sub proponent where the sub proponent is in litigation adverse to the Town.

1.30 Legal Compliance

The Contract/Agreement resulting from the Request for Proposal shall be governed by, subject to and interpreted in accordance with the laws of the Province of Ontario. The successful Proponent will be also be required to comply with all local, municipal, provincial and federal license requirements, laws, regulations, ordinances and codes.

1.31 Insurance

The successful Proponent shall maintain and pay for **Comprehensive General Liability Insurance**. The coverage shall include premises and all operations liability to be performed by the Proponent, his/her employees, and/or agents. This insurance coverage shall be subject to limits of not less than Two Million Dollars (\$2,000,000.00) inclusive per occurrence for bodily injury, death and damage to property including loss of use thereof for any one occurrence.

The policy of insurance described above shall:

- a. include the Town and others, if required, as an additional insured;
- b. contain a cross-liability clause;
- c. contain a severability of interests clause endorsement;
- d. provide that if cancelled or changed in any manner, thirty (30) days prior written notice by mail or facsimile transmission must have been given by the insurer to the Town failing which such cancellation or change shall be void as against the Town; and,
- e. be maintained in good standing without interruption during the entire period that services are provided pursuant to this agreement.

In addition, the successful Proponent shall carry **Professional Liability Insurance** in the amount of not less than Two Million Dollars (\$2,000,000.00) per occurrence.

The Insurance Policies shall not be altered, cancelled or allowed to expire or lapse, without thirty (30) days prior written notice to the Town. Proponents shall clearly identify in their Proposal the insurance requirements as outlined above. The Proponent will be entirely responsible for the cost of any deductible that is maintained in any insurance document.

1.32 Workplace Safety and Insurance Board, if applicable

The successful Proponent will be required to submit to the Town a valid WSIB Clearance Certificate stating that all assessments the Proponent is liable for under the Workplace Safety and Insurance Act have been paid. A WSIB Clearance Certificate shall be provided prior to commencement of the project and upon presentation of the final invoice.

If the Proponent is an independent operator, a Clearance Letter must be submitted to the Town from WSIB prior to the successful Proponent being paid.

1.33 Bankruptcy

In the event that, during the duration of the agreement, the Proponent makes an assignment for the benefit of creditors, or becomes bankrupt or insolvent, or makes a proposal to its creditors, this agreement shall immediately be terminated, and the Town shall be entitled to enter into an agreement with another party without the consent of the Proponent.

Patent, Copyright, or Other Proprietary Rights

In accordance with Municipal Freedom of Information and Protection of Privacy Act, Proponents are reminded to clearly identify in their Proposal material, any specific scientific, technical, commercial, proprietary, intellectual or similar confidential information, the disclosure of which could cause them injury or damage.

Proponents are encouraged to place all such detail and information within a separate section of their submission. Complete proposal details are not to be identified as confidential.

1.34 Performance Evaluation

Meetings between the successful Proponent and the Town may take place to discuss the successful Proponent's performance on an ongoing basis, and to follow up on any problem(s), which may have been discussed at prior meetings. The interval of these meetings will be at the Town's discretion and will be determined by the successful Proponent's performance.

1.35 Form of Agreement

The successful Proponent will enter into a written agreement in a form approved by the Town. Should negotiations with the successful Proponent be discontinued, the Town reserves the right to open discussions with other Proponents. A sample agreement is attached for the Proponent's information. This sample agreement will be modified appropriately once the successful Proponent is selected. (Attached draft form of agreement)

1.36 Information to be Provided by the Town

The following information relating to the project is available for review at the Town Hall and on the Town's website under "Economic Development > Reports & Studies". Copies will be supplied to the successful Proponent.

- Action Plan (2007)
- Community Profile
- Assessment of Competitive Position
- Economic Development Plan (2005)
- Community Improvement Plan

The above information is provided but does not form part of the Request for Proposal and will not form part of the contract documents.

2.0 TERMS OF REFERENCE

2.1 Overview

A vibrant community of approximately 8,500 residents, the Town of South Bruce Peninsula strives to maintain a sustainable balance of initiatives that focus on community, environmental preservation and managed growth. The “Town” works to ensure residents, businesses and visitors enjoy a lifestyle that encourages the best of rural and urban living.

South Bruce Peninsula is recognized internationally for some exceptional features: Sauble Beach; one of the longest and most beautiful fresh water beaches in the world, Wiarton Willie; the world’s most famous weather prognosticating albino groundhog, and Wiarton stone; quality stone exported from local quarries.

Located on the southern portion of the renowned Bruce Peninsula, the municipality is home to a variety of rare and unique plant species and wildlife. A natural paradise for tourists, the area makes up some of the most alluring parts of the Niagara Escarpment, a World Biosphere Reserve and has the largest remaining area of forest and natural habitat in Southern Ontario (ref. Parks Canada). Lake Huron runs up the entire west coast of the Peninsula and Georgian Bay up the east with more than 580 kilometers of magnificent, serene shoreline. The municipality is flanked on the north east by Chippewas of Nawash First Nation and the south west by the Chippewas of Saugeen First Nation.

Within 2 to 3 hours of Ontario’s major urban markets and only 25 minutes from the City of Owen Sound, the municipality is blessed with an abundance of amenities for its size. Some of the amenities include: a shared airport capable of accommodating large corporate aircraft, a hospital with 24/7 emergency care, state of the art public school with a 400 seat auditorium, vibrant ‘downtown’ commercial areas, grocery stores, banks, restaurants, veterinaries, professional services, motels/B&B’s, libraries, daycares, an outdoor education centre, mountain bike park, nature reserves and conservation areas, a speedway, amusement park, pool, tennis courts, marinas, updated community centres, exceptional long term care facilities, and a host of recreational areas, parks and trails (including the prominent Bruce Trail).

The current Council for the Town of South Bruce Peninsula was elected in 2010 and is in their 1st year of a 4-year term. Council and Town staff have confirmed the need to develop a framework that works towards a long-term vision for the Corporation and the entire community.

2.2 Background

The purpose of the project is to prepare a Community-Based Strategic Plan (CBSP) for the entire Town of South Bruce Peninsula and its corporation.

Community-Based Strategic Planning is viewed as a process for determining where an organization is going over the next 10 years. The CBSP will not only develop a clear statement of the community’s vision it will also assist the Town to develop its corporate goals and objectives.

Specifically the CBSP will be used by the Town as a guide for long-term:

- Strategies and tactics to implement the vision
- Planning to set organizational goals
- Principles to guide decisions
- Identification of priorities and development of annual work plans
- Alignment between the Strategic Plan, Departmental work plans and the municipal budget
- Performance management, measurement systems and progress reporting to evaluate success in achieving the goals of the CBSP; and
- Mechanisms to facilitate ongoing communication among administrative staff, Council and the community.

2.3 Guiding Principals

Setting out the functional activities which describe the future, the guiding principles of the CBSP would include, but not be limited to:

- **Sustainable Fiscal Policies** – Ensuring that the Town is financially stable, developing a long term strategic financial plan, including but not limited to water, sanitary and storm sewer systems, equipment replacement, bridge replacement and transportation network replacement.
- **Growth Management** – Ensuring and facilitating balanced growth, planning of future urban and rural areas, providing a view of the Town’s future which articulates settlement patterns, rate of growth, infrastructure needs, review waste management studies, etc.
- **Infrastructure Development** – Effectively planning and prioritizing the Town’s infrastructure (transportation, asset management).
- **Quality of Life** – Optimize the provision of municipal services while supporting and promoting health care, social, education, seniors housing, cultural and public/private recreational facilities and activities.
- **Communication** – Improving information and communication about the Municipality (who we are, what we do) – both internally and externally.
- **Environmental Protection** – sustainable development principles, energy conservation, resource management, public services in recreational settlement areas).
- **Economic Development** – capitalize upon the Town’s competitive strengths to determine and diversify its economic base to retain and grow the industrial, commercial, agricultural, and tourism opportunities to provide year round jobs locally for residents. The completion of the CBSP will assist the Town in developing of a strategy for Economic Development.

2.4 Method

In order to determine where it is going, the Town needs to know exactly where it stands. In addition to plans, studies and strategies that exist with external agencies and community partners, the CBSP will build on and reinforce existing policies, plans and strategies that currently exist within the Town.

The proposed process for developing the CBSP will also include significant public consultation and an extensive communication strategy. To that end, the CBSP project has been created and includes detailed information on a method consisting of key elements, phases, project team members and costing.

Intended to be an open and transparent process, key elements will include:

- clearly defined phases;
- meaningful public engagement tactics that are evaluated for effectiveness and involve internal staff as well as the Town’s many residents and community groups including - senior, youth, heritage, business, recreation and special interest;
- linkages with other Town initiatives;
- targeted communication strategies with consistent messaging for both internal and external audiences; and
- regular reports to Council ensure that the project is completed both on time and on budget.

The following is a proposed process and timeframe only, and should be used as a guideline while developing the proposal.

2.5 Phase 1

Phase I – Project Initiation

Timeframe: 3 weeks

Goal(s): Agreement on concept and process, development of a communications plan, launch, review of current situation and initial identification of strengths, weaknesses, opportunities and threats (SWOT).

Action	Description
Assess Current Situation	<ul style="list-style-type: none"> ▪ Consultant will complete a search, review and report of key existing plans, studies, etc. to assess the Town's current situation.
Internal SWOT	<ul style="list-style-type: none"> ▪ Consultant will complete an initial high level assessment to enhance understanding of internal SWOT facing the Town to be issued to staff and Council to provide insights and information.
Staff/Council Workshops	<ul style="list-style-type: none"> ▪ Meeting(s) will be held with staff to discuss strategic planning, strategic issues, strengths and opportunities and the process options. ▪ Other meeting(s) will be organized with Council to discuss SWOT, initial findings of the current situation and the proposed process.
Communications Plan	<ul style="list-style-type: none"> ▪ Consultant will prepare a communications plan to support the strategic plan and public input process.
Community Questionnaire	<ul style="list-style-type: none"> ▪ Consultant will develop/confirm a list of questions to be posed to the community through various methods of data collection.

2.6 Phase 2

Phase 2 – Strategic Listening

Timeframe: 4 weeks

Goal(s): Validation of key issues and challenges; focused input from Council, staff and key stakeholders; input from a wide range of residents and Town's various community groups.

Action	Description
Council/staff focus groups	<ul style="list-style-type: none"> ▪ Council/staff focus groups will take place. The purpose will be to validate and further assess the SWOT information collected in Phase 1.
Community Questionnaire	<ul style="list-style-type: none"> ▪ A short questionnaire to be deployed in a number of ways to maximize community feedback.
Town Hall meetings (2)	<ul style="list-style-type: none"> ▪ Consultant to facilitate general public meetings to introduce the CBSP process and solicit ideas on what participants would like the Town to be like in 20 years.
Contest for youth	<ul style="list-style-type: none"> ▪ A challenge will be issued to youth through the local newspapers to send in written or drawn submissions to Town Hall on what they want the Town to be like in 20 years. Three names will be drawn by the Mayor and prizes awarded. This will allow for wide access to youth across the community. Submissions will be displayed inside Town Hall for public viewing.
Community groups meetings (2)	<ul style="list-style-type: none"> ▪ Consultant will organize meetings with multiple groups in the community to discuss questions on the future of the Town. These same participants will be involved in validating the CBSP in Phase 4.



Action	Description
Community places and spaces conversations	<ul style="list-style-type: none"> Community intercepts will take place at various locations throughout the Town to gain access to a wide range of constituents and solicit public feedback via paper based survey.
Stakeholder meetings (2)	<ul style="list-style-type: none"> Consultant will organize meetings with multiple stakeholders in the community to discuss questions on the future of the Town. These same participants will be involved in validating the CBSP in Phase 4.

2.7 Phase 3

Phase 3 – Developing the Framework

Timeframe: 2 weeks

Goal(s): Based on all of the work detailed above, the consultant will disseminate and analyze the results and prepare a draft framework of a CBSP.

Action	Description
Council/Staff Workshop	<ul style="list-style-type: none"> Consultant will coordinate a workshop with Council and staff to review, comment and provide additional input into the CBSP.

2.8 Phase 4

Phase 4 - Validating the Framework

Timeframe: 2 weeks

Goal(s): Internal and external validation of CBSP.

Action	Description
Community Group meeting	<ul style="list-style-type: none"> Consultant will coordinate a community group meeting. Participants will have participated during Phase 2 of the exercise.
Stakeholder meeting	<ul style="list-style-type: none"> Consultant will coordinate a stakeholder group meeting. Participants will have participated during Phase 2 of the exercise.
Town Hall meetings (2)	<ul style="list-style-type: none"> Consultant will facilitate (2) general public meetings to introduce the strategic plan in its draft format and hear views directly from community members.
Web survey	<ul style="list-style-type: none"> Surveys will be posted on the Town's website and will be devised to solicit input on the draft framework.
Staff focus group	<ul style="list-style-type: none"> A meeting will be scheduled with the appropriate staff to validate internal findings.

2.9 Phase 5

Phase 5 – Refinement and Communication

Timeframe: 4 weeks

Goal(s): Final Community-based Strategic Plan; guiding document for Town policy and operations.

Action	Description
CBSP Refinement	<ul style="list-style-type: none"> Consultant to prepare a draft of the CBSP to be refined based on input provided in Phase 4
Council Workshop	<ul style="list-style-type: none"> Consultant will meet with staff and Council to present the final draft CBSP with incorporated findings from Phase 4.



Action	Description
Formal Council approval	<ul style="list-style-type: none"> ▪ CBSP will be presented to Council for formal approval.
CBSP Communication	<ul style="list-style-type: none"> ▪ Once the plan is finalized, it will be communicated both internally and externally as part of the Communications Plan developed in Phase 1.

2.10 Project Team

Council will guide development of the process along with a core team of staff comprised of: Chief Administrative Officer (CAO), Clerk, Public Works Manager, Fire Chief, Manager of Financial Services, Chief Building Official (CBO) and the Economic Development Officer (EDO).

2.11 Scope and Constraints

The selected consultants are required to assist the Town by ensuring that the process maintains a number of key principles:

- a. The process must be open to every resident, business and organization in the community and be developed in such a way to achieve maximum participation from the community.
- b. The plan progress must be clearly communicated to the public using the direction of a Communication Plan, which has been formulated with Town Staff and the Consultant.
- c. The communication of the importance of this process to the future of the community is required as well as utilizing creative methods for garnering public input. The process needs to be seen as interesting and generate enough importance to encourage participation. The communication activities must create some sense of excitement in the future process.
- d. The vision must:
 - be tangible;
 - be marketable to residents and the outside world;
 - be rooted in today's (and tomorrow's) reality; and,
 - recognize trends and emerging realities.
- e. The objectives and associated actions must be realistic and achievable;
- f. The Town's website should be utilized to communicate the process to the public.
- g. Respondents are encouraged to present models of community data collection using online/web technology.

2.12 Deliverables

It is expected that Consultant will produce the following deliverables:

- Communications Plan
- Town's Current Situation & SWOT Analysis
- Community Questionnaire
- Community Consultations
- Community Consultation Report



- Draft Community-Based Strategic Plan
- Final Community-Based Strategic Plan

2.13 Consultant Selection Criteria

The following criteria will be used for evaluating the Proposals. The Town reserves the right to shortlist firms for further evaluation and interviews that may alter the final scoring results. Proposals will be scored based on meeting or exceeding the expectation of the established evaluation criteria.

- Understanding of the assignment and significant issues
- Proposed Methodology
- Detailed Project Plan/Schedule including:
 - Resource allocation.
 - Time committed by each resource.
 - Detailed cost breakdown.
- Experience of staff / sub-consultants, assigned to the project
- Timing of the project
- Past experience with similar projects
- Progress reporting
- Effectiveness of Public Consultation
- Budget

Item	Evaluation Criteria: Proposals will be based on meeting or exceeding the expectation of the established evaluation criteria and weighting.	Weight Factor
1	Company Overview	2
2	Project Manager (s) and Staff	5
3. a)	Experience in Statistical and Community Economic Analysis	5
3. b)	Experience with Community/Public Consultation	5
3. c)	Facilitation Experience	5
3. d)	Experience in the Development of Community-Based Strategic Plans and/or Community Adjustment Plans	5
4.	Project Understanding and Work Plan	5
5.	Schedule of Work	4
6..	Budget	4

Note: The weighting factor indicates the relative importance of each particular criteria starting at 1 for minimal influence up to five (5) for increasing influence.

3.0 FINANCIAL PROPOSAL

- 3.1 Respondent shall provide a **firm cost** to complete the Project, including all professional fees and disbursements. Also provide a proposed payment schedule based on defined milestones or deliverables. Additionally, and in the format of the work schedule required above, provide the hourly or per diem rates, which accompany the level of effort, by individual team members.
- 3.2 Proposals shall specify the basis of the fee for consulting services that represents an upset cost to the Town.
- 3.3 The Proposal must confirm that the proponent will not undertake any work, which they believe, is beyond the terms of reference and their written Proposal for the Project without the prior written authorization from the Town.
- 3.4 The Proposal shall indicate the proponent's staff identified in the proposal and their respective roles shall not be altered unless written authorization is obtained from the Town.
- 3.5 Proposals shall remain valid and open for acceptance by the Town for a period of ninety (90) calendar days following the due date for receipt of Proposals.
- 3.6 It is the Proponent's responsibility to verify the extent of work required under this Project. No allowances will be made for the Proponent failing to do so. Any item not specifically mentioned in the specifications but implied or required to complete the Project will be considered to be included in the total price.
- 3.7 The Proponent shall carefully consider any and all work that may be necessary to complete this Project, including sub-proponents and disbursements, and shall allow for the cost of such work during preparation of their financial proposal. The Proponent is advised that the Town will not approve any payment beyond the upset limit unless the Proponent is required to do work which clearly could not have been anticipated during preparation of their proposal, which work is approved in writing by the Town.
- 3.8 The Proponent offers to provide the services detailed herein in accordance with the complete RFP ED01-11, and as further detailed in the Proponent's Proposal, to the acceptance of the Town for the following Firm Total Price. HST must be shown as a separate item:



4.0 PROPONENT’S DECLARATION

We certify that:

- a) The party executing this document is authorized to sign the same.
- b) To the best of my/our knowledge and belief the information provided in our Proposal submission is correct.
- c) Except as expressly and specifically permitted in the instructions to proponents, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in this Proposal process, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no such claim.
- d) To the best of my/our knowledge and belief our proposal submission is made without any connection, comparison of figures or arrangement with or knowledge of any other corporation, firm or person submitting a bid for the same work and is in all respects fair and without collusion or fraud.
- e) To the best of my/our knowledge and belief no member of Town Council, Committees and no officer or employee of the Town of South Bruce Peninsula is, will be, or has, become interested, directly or indirectly, as a contracting party, partner, stockholder, surety or otherwise in, or in the performance of this agreement, or in the supplies, work, or business to which it relates, or in any portion of the profits thereof, or in any of the money to be derived there from.
- f) My/Our proposal submission will remain open for acceptance for a period of 90 (NINETY) business days after opening of the Proposals and the Town of South Bruce Peninsula may at any time within this period accept our proposal submission.
- g) To the best of my/our knowledge and belief there is not nor was there any actual or perceived unfair advantage or conflict of interest in our bid submission or our performing of or observing the contractual obligations of the proponent as set out in the contract.
- h) I/We agree if awarded the contract that I/we will supply at the time of issue or my execution of the contract, at my/our expense, a copy of our letter of incorporation, certificate of corporate status, or business registration.
- i) The Proponent must state whether the proponent is a corporation, person, partnership, consortium, sole proprietorship or other legally recognized entity.
- j) If the Proponent is a corporation, partnership, consortium, sole proprietorship, or joint venture, the Proponent must state the Proponent’s legal name and any other names under which the Proponent carries on business.

Name of Firm: _____

Signing Officer’s
Signature: _____

Declared by me this _____ day of _____ 2011.