



TOWN OF SOUTH BRUCE PENINSULA
5-Year Corporate Strategic Plan
Request for Proposals

RFP# 20-06

Issued: March 19, 2020
Closing Date: April 17, 2020
Closing Time: 4:00 p.m.

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1.0 Invitation

The Town of South Bruce Peninsula is seeking proposals from qualified consulting firms to assist in the development of a new, comprehensive corporate strategic plan. The successful Proponent must have extensive strategic planning experience, including the ability to conduct all relevant research, coordinate and facilitate the planning process, and create a corporate strategic planning document that includes a longer term vision and values, together with medium term objectives and priorities and shorter term action plan.

The strategic plan will be built on a clear understanding of our community and its local and regional economy. The strategic plan will be the outcome of community, staff and Council consultation and built on an innovative perspective that leverages the many strengths of the Town South Bruce Peninsula.

The Town requires that the project be completed and presented to Council no later than **October 20, 2020**.

2.0 Community Profile Summary

South Bruce Peninsula was amalgamated in 1999 from the former Town of Wiarton, the former village of Hepworth, and the former townships of Albermarle and Amabel. The Town is now comprised of the two larger urban areas of Sauble Beach and Wiarton along with the smaller villages and hamlets of Allenford, Colpoy's Bay, Elisnore, Hepworth, Hope Bay, Howdenvale, Mar, Oliphant Park Head, Purple Valley and Red Bay.

South Bruce Peninsula sits between the sandy beach shorelines of Lake Huron and rugged limestone cliffs of the Niagara Escarpment along Georgian Bay. The Town is home to a variety of wildlife and unique plant species and encompasses part of the World Biosphere Reserve. With growth and development at the forefront, the Town strives to balance the protection and management of its unique natural heritage and environment with the needs of the tourism and development industries.

The Town of South Bruce Peninsula has approximately 8500 (2016 Census Pop) full-time residents. This number is doubled with an estimated 3204 non-resident homes in the summer. In addition, the communities of South Bruce Peninsula see a considerable influx of visitors to the area during the peak seasonal months being May through October. Tourism data indicates that there are 2.5 million visitors to Bruce County annually with an overall economic impact of \$299.1 million. It is estimated that 60% of these visitors are visiting South Bruce Peninsula. ¹

In the last two census', the employment rate grew by 1.2%, an average growth rate of 0.24% per year from 2011 to 2016. A growing employment rate reflects positive economic conditions. ²

The Town and community groups have taken many steps towards strategic planning, including developing an Asset Management Plan, a Community Strategic Plan, a Community

¹ 2018 Bruce County Economic Impact of Tourism Report <https://brucecounty.on.ca/business/economic-development>

² South Bruce Peninsula Townfolio <https://townfolio.co/on/south-bruce-peninsula/overview>

Improvement Plan, Oliphant Coastal Stewardship Plan, Sauble Beach Management Plan, re-development of Bluewater Park and most recently a Parks, Recreation and Culture Master Plan. A full list of relevant reports and studies can be found under section 4.0.

Critical success factors for our Corporate Strategic Plan will need to ensure the involvement of a representative cross-section of citizens from across the Town. Further Town staff and Council will need to be engaged throughout the process to validate what actions may be feasible within current/anticipated funding frameworks. The Town's web-based community engagement software will be integral in gathering community feedback.

3.0 Terms of Reference

Scope of Work

The purpose of the South Bruce Peninsula Corporate Strategic Plan is to develop a (five-year) corporate and organizational strategy that includes a long-term vision and values, together with medium term objectives and priorities and shorter-term action plans. The Corporate Strategic Plan will replace the current Community Based Strategic Plan and will reflect Council's vision from which they will develop their priorities.

The Town understands that there are a variety of perspectives, models and approaches that can be used to develop a corporate strategic plan. The selected proponent, therefore, should be able to determine which model would be best suited to meet the needs of the Town, enabling South Bruce Peninsula to reach its organizational goals.

Regardless of the strategic model recommended, the plan will encompass the following guiding principles being community culture, collaboration and partnerships and economic sustainability. All objectives and action plans should consider these principles

The proponents are requested to provide detailed information on options for community, Council and staff consultation as part of their proposal. Use of the Town's engagement platform Open Mic <https://openmicsouthbrucepeninsula.ca/> should be included as part of the engagement process. The Strategic Plan should include methods (including strategy and specific actions, with first steps) to accomplish the goals of the plan. The plan should also include actions to enhance the success of the longer-term strategies. The plan should provide a situational analysis of the critical issues facing the Town, the plan should include actions and goals as well as initial steps to meet the goals set forth in the plan.

Final Report

The proponent will make any recommendations to the draft Strategic Plan after review and approval by the Town's Corporate Strategic Planning Team (the "project team") and prior to submission to Council for adoption. The Proponent may be required to make changes to the submitted draft after the project team and CAO have reviewed the plan. The plan, inclusive of changes, will become the final plan. This document and any supporting documents should be produced in digital format with ten hard copies provided to the Town upon final completion.

Receipt of Proposal

RFP Packages can be obtained by contacting Town Hall, or on the Town website at www.southbrucepeninsula.com.

It is the sole responsibility of the Proponent to submit their proposal, with all accompanying schedules, appendices and addenda to be received prior to the closing time of **4:00 p.m.** on **Friday, April 17, 2020**. Proposals received after the noted due time will not be considered. The time indicated on the phone system at reception in Town Hall, is the official timepiece for the receipt of all proposals whether by hand/courier delivery or email.

Proposals received after the closing date and/or time or in locations other than the address indicated, will not be accepted and will be returned unopened. The Town of South Bruce Peninsula reserves the right, at its sole discretion, to extend the closing date and time.

Five (5) hard copies of the proposal should be enclosed and sealed in an envelope clearly marked: **“Request for Proposal – Corporate Strategic Plan”** along with one (1) electronic version on USB flash drive. The municipality reserves the right to make additional copies for internal use as required.

The Town of South Bruce Peninsula will not be liable for any delay for any reason. It is the Proponent's sole responsibility to ensure they allow themselves enough time to submit the proposal prior to the closing date and time.

Proposals received by facsimile or e-mail will not be accepted. All costs to prepare the proposal shall be borne solely by the Proponent.

Amendments to a proposal may be submitted if delivered in writing prior to the closing time. In addition, proposals may be withdrawn, provided a written and signed notice has been received prior to the closing time.

Any deviations from the requirements or conditions specified in this RFP must be clearly stated in the Proponent's proposal. The Town of South Bruce Peninsula will be the sole judge as to what constitutes an acceptable deviation. If no deviations are indicated in the Proponent's proposal, the Town expects the Proponent to be in full compliance with the requirements and conditions stated herein.

If any of the terms set out in the RFP are unacceptable to the Proponent, the Proponent must identify such terms and provide suggested alternatives in its proposal. Suggested alternatives will be considered during the evaluation process.

All proposals are irrevocable for a period of sixty (60) business days from the closing time.

Key Deliverables

The proponent will be responsible for providing expert advice throughout the project, and for the following deliverables at a minimum:

- Develop and provide a project schedule. The final report should be presented to Council no later than October 20, 2020.
- Develop a work/action plan to achieve the mandate of the RFP. Project Coordination, including regular meetings and status reports to keep the project on schedule and keep identified stakeholders apprised of the process.
- Orientation/training of the participants to the process and components of corporate strategic planning. Reference the other Plans and studies to provide a solid framework for the corporate strategic plan.
- Community, Council and employee input, including gathering of stakeholder information and input as well as using appropriate methods of communication and engagement including the use of the Town's community engagement platform Open Mic.
- Process and meeting facilitation, assisting discussion and decision making and ensuring that conversations are forward-looking, action oriented and move the participants towards creating a shared future.
- Needs assessment/environmental scan – reviewing existing plans and documents pertinent to the comprehensive community strategic plan, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats.
- Planning, coordinating, and taking minutes of all meetings, including community/employee consultation sessions and meetings with Council and staff. This can be in conjunction with assigned Town staff.
- Organize and facilitate public meetings to disseminate and gather information relevant to the process.
- Plan documentation, including development of an interim and final report for the project, including executive summary.
- Proponents are not limited by the deliverables outlined above, proposals may provide additional deliverables as part of the Proponent's response.

4.0 Background Documents, Plans and Reports

- Asset Management Plan
- 2018 Bruce County Economic Impact of Tourism Report
- Community Strategic Plan
- Community Improvement Plan
- Downtown Revitalization Plan
- South Bruce Peninsula Economic Development Plan
- Find Yourself in Bruce County Economic Development Plan

- Recreation and Culture Master Plan
- 2011 Trends, Opportunities, Priorities Report
- The Official Plan and Zoning Bylaw
- Waste Management Master Plan

Reports and Studies can be found:

<https://www.southbrucepeninsula.com/en/economicdevelopment/resources.asp>

5.0 Proposal Evaluation

All submitted proposals shall become the property of the Town of South Bruce Peninsula.

Evaluation criteria shall include but not be limited to:

- Completeness and thoroughness of proposal submitted in response to this RFP;
- Background in corporate planning and demonstrated ability and experience to provide quality work and appropriate recommendations;
- Expertise and relevant experience of assigned personnel;
- Suitability and practicality of the overall methodology (work plan);
- Experience in working with local governments of a similar size in Ontario;
- Ability to deliver within the time frame;
- Project costs, schedule and commitment to the project.

The following criteria will be used for evaluating the Proposals. The Town reserves the right to shortlist Respondents for further evaluation.

	Evaluation Criteria	Weight Factor
1	<p>Qualifications and Experience</p> <ul style="list-style-type: none"> • Experience and credentials of firm. • Experience and qualifications of personnel assigned to the Project • Experience relating to similar projects • Overall local experience • Experience working with other municipal governments in Ontario and a demonstrated ability to conduct research, facilitate studies of this nature and write reports and deliver the Project 	25

	requirements on time and on budget. (Three references to be provided on form described below.)	
2	Methodology A description of Project approach, including value-added services	30
3	Work Plan A detailed work plan that includes a Manning Table, a schedule in the form of a Gantt chart, and the Proponent's process for monitoring and maintaining that schedule. Evidence that the Consultant has the internal capacity and resources to perform the work.	30
4	Price Overall submitted price for work described in this RFP and the preparation of the final Study, including the Proponent's process for monitoring expenditures so the Project remains on budget. The proposal with the lowest price will be given 15 points.	15
	Total	100

The Town is under no obligation to proceed with the RFP. Should it decide to abandon the proposal, it may, at any time, invite further expressions of interest for the provision of consultant services to complete the project.

Proponents may be required to provide additional information prior to the award of a contract and could be requested to partake in an evaluation interview, pending a proposal shortlisting process.

Proposals should include:

- References (Include names, current contact numbers and email addresses)
- Team Members Resumes
- Consultation options and recommended methods

References will be contacted by the Town. Any unfavourable reference (in the sole discretion of the Town) will not necessarily disqualify any Respondent however any unfavourable reference may form the sole reason why any Respondent is not chosen to enter into a contact with the Town.

6.0 Instruction to Proponents

Closing Date/Time Location

Respondents should submit their proposal submission (one hard copy per proponent) in a sealed outer envelope, clearly marked as follows:

20-06 Corporate Strategic Plan RFP

Angie Cathrae
Clerk
Town of South Bruce Peninsula
PO Box 310, 315 George Street
Warton ON N0H 2T0
angie.cathrae@southbrucepeninsula.com

Submissions are to be received no later than **4:00 pm** on **April 17, 2020**.

Respondents will submit their proposals using the two-envelope method and in accordance with the Town Purchasing Policy. The proposal and qualitative information will be submitted in one envelope and the pricing information will be included in the second envelope. The second envelope will only be opened and contents considered if the first envelope submission is evaluated and meets the requirements of the Request for Proposal.

Inquiries

All communications relating to this request for proposal are to be directed to:

Danielle Edwards (Designated Official)
Economic Development Officer
Town of South Bruce Peninsula
PO Box 310, 315 George Street
Warton ON N0H 2T0
danielle.edwards@southbrucepeninsula.com

Should a Respondent find discrepancies, omissions from the request for proposal document(s) or is in doubt as to the meaning of the document(s), such Respondent should notify the Designated Official as soon as possible but no later than **April 1, 2020 at 10:00 am**. The Town will issue in writing any changes/additions/deletions.

Any and all addendum/addenda issued prior to the closing date shall form part of the proposal submission document. The cost of complying with the addendum/addenda shall be included in the quoted price.

It is the responsibility of the Respondent to seek clarification of any matter that they consider unclear before submitting a proposal submission. The Town is not responsible for any misunderstanding of the Request for Proposal on the part of the Respondent.

No oral interpretations shall be made by the Designated Official as to the meaning of any of the request for proposal requirements or be effective to modify any of the provisions of the request for proposal document(s).

The Town will make no guarantee of answer to any question and it shall be hereby understood by all respondents that any response or non-response by the Town to any question or inquiry will not be constituted by any respondent as a denial of, barrier to or excuse for not submitting a proposal submission as outlined herein.

No representative of the municipality, its employees, agents or any other expert advisor associated with the request for proposal shall be contacted by the Respondent during the preparation of their proposal submission except as noted above.

Any attempt to influence the evaluation and selection process may result in immediate disqualification of the Respondent. Any attempt to bypass the Town Purchasing Policy is grounds for rejection of the Respondent's proposal submission.

Amendments to Request for Proposal (Addenda)

It is the responsibility of the proponent to thoroughly examine the RFP document and satisfy itself as to the full requirements of the RFP. If required, an addendum will be issued and will be placed on the Town website (www.southbrucepeninsula.com). It is the responsibility of the proponent to view the Town website to obtain any addenda

Pricing and Taxes

Prices quoted shall be in Canadian funds, quoted separately for each item if stipulated.

Prices shall be quoted in such a manner that should the Respondent be successful in entering into a contract with the Town, the prices will be confirmed for the entire length of the contract.

The prices must include all incidental costs and the Respondent shall be deemed to be satisfied as to all of the full requirements of the Request for Proposal call.

All prices quoted shall include all charges of every kind attributable to the provision of services.

All applicable taxes will be considered to be included in the price submitted by the Respondent; HST shall be stated separately.

Any extra fees or charges not specified in the proposal submission will not be considered when making a contract award and subsequently will not be paid by the Town to any successful Respondent.

Withdrawals of Proposals

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

7.0 General Terms and Conditions

Confidentiality

Information about the Town of South Bruce Peninsula obtained by a proponent must not be disclosed unless authorized by the Town. By submitting a Proposal, the proponent agrees that this obligation of confidentiality will survive the termination of this RFP and any contract that might arise between the parties.

Conflict of Interest

Each Proponent shall declare to the Town as part of their proposal any situation that may be either a conflict of interest or a potential or perceived conflict of interest with the contractual obligations of their proposal. If a conflict of interest exists, in the sole discretion of the Town, the Town reserves the right to reject the Proponent's submission or to otherwise require measures to be taken by the Proponent to mitigate the conflict.

Costs Incurred by Proponents

All costs and expenses incurred by the Respondent relating to the Proposal submission and any negotiations with the Town will be borne by the Respondent. The Town is not liable to pay such costs or expenses or reimburse or compensate Respondents under any circumstances, including the rejection of any or all Proposal submissions. The Town will not accept responsibility for any delays or costs associated with any review or the evaluation process.

No Respondent 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 Respondent shall be deemed to have agreed that it has no claim. The Respondent understands that by making a Proposal submission, there is no implied or guaranteed contract under any circumstances. The Respondent hereby releases and waives any claims for damages, including any claims for damages for fundamental breach, relating to this Request for Proposal call.

Errors and Omissions

It shall be understood and acknowledged that while this request for proposal includes specific requirements and specifications, minor items or details not herein specified but obviously required for the provision of services shall be provided as if specified in conformance with modern practices. Any omission, errors or misinterpretation of these requirements and specifications within the document(s) shall not relieve the Respondent of the responsibility of providing the costs of such goods or services as aforesaid.

Reserved Rights of the Town

The Town reserves the right, in its sole discretion, as follows:

- To issue an award for the services in whole or in part.
- To 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 Respondent, or any Respondent, if it is determined by the Town that the costs of the services to be provided under the contract would exceed budgetary allotments.
- To make public the names of any or all Respondents.
- To reject a Respondent's proposal submission on the basis of:
 - A financial analysis determining the actual cost of the proposal submission when considering factors including but not limited to quantity, quality, service, price and other costs arising from the delivery of the required services;
 - Information provided by references and any interpretation of the information provided by references, at the sole discretion of the Town;
 - The Respondent's past performance on previous contracts awarded by the Town;
 - The information provided by a Respondent pursuant to the Town exercising its clarification rights under this Request for Proposal process;
 - Other relevant information, in the sole discretion of the Town, that arises during the Request for Proposal process.
- To waive formalities and accept a proposal submission which substantially complies with the requirements of this Request for Proposal.
- To check references other than those provided by a Respondent.
- To disqualify any Respondent whose proposal submission contains misrepresentations or any other inaccurate or misleading information or any qualifications.
- To disqualify any Respondent or the proposal submission of any Proponent who has engaged in conduct prohibited by this Request for Proposal call.
- To make changes, including substantial changes, to this Request for Proposal provided that those changes are issued by way of addenda in the manner set out in this Request for Proposal call.
- To cancel this Request for Proposal process at any stage.
- To cancel this Request for Proposal process at any stage and issue a new Request for Proposal, Request for Quotation or Call for Tender Submission for the same or similar deliverables.

- To accept any Proposal submission in whole or in part.
- If a single Proposal submission is received, to reject the Proposal submission of the sole Respondent and cancel this Request for Proposal process or enter into direct negotiations with the sole Proponent.
- To reject any or all Proposal submissions in its absolute discretion and despite any evaluation which may be undertaken of the Proposal submissions.
- To reject any Proposal submission if the Respondent or any officer or director of the Respondent is or has been engaged, either directly or indirectly through another corporation, in a legal proceeding with the Town, its elected or appointed officers and employees.
- 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 Respondent or any third party resulting from the Town exercising any of its expressed or implied rights under this Request for Proposal.

Collusion and Fraud

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

Indemnity

Neither the issuance of this Request for Proposal document nor the receipt of any proposal submission shall constitute any obligation or imply any commitment on the part of the Town. Award of this Request for Proposal call shall be at the sole discretion of the Town. In the evaluation of proposal submissions, it is understood by the Respondent that the Town of South Bruce Peninsula reserves the right, in its sole discretion, to reject any or all bids and the lowest or highest bid as the case may be will not necessarily be accepted. Award of a contract in its entirety or in part shall be in accordance with Town requirements.

The Respondent, by participating in the Request for Proposal in any manner, 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 resulting from or arising out of the Respondent's participation in the Request for Proposal.

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 (the Act). The name of each Proponent will be made public.

The Proposal submission price will be made public only if the second envelope is considered. Disclosure of any other information will be made in accordance with the Act. The Respondent must specifically identify any information in its Proposal submission that is submitted in confidence and must state the reason the information is considered to be confidential.

Even in stating a request that information be kept confidential, the Respondent understands that all documents held by the Town are subject to disclosure if so directed by the Information and Privacy Commissioner and/or a court of competent jurisdiction.

Workers Safety and Insurance Board

The successful Respondent will be required to submit to the Town a WSIB Clearance Certificate prior to execution of a contract.

If the successful Respondent is an independent operator, an Independent Operator Status letter must be submitted to the Town from WSIB prior to the execution of a contract.

Insurance

- The Respondent shall understand that when the Town enters into a contract, insurance coverage shall be required.
- Insurance coverage shall include coverage of premises and all operations liability to be performed by the Respondent, 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:
 - Contain a cross-liability clause;
 - Contain a severability of interests clause endorsement;
 - 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
- Be maintained in good standing without interruption during the entire period that services are provided under executed contract.

- The successful Respondent must provide a copy of the insurance policy or policies to the Town prior to the execution of any contract.

Accessibility

- In accordance with Ontario Regulation 429/07, Accessibility Standards for Customer Service Sect. 6, every provider of goods and services shall ensure that every person who deals with members of the public or participates in the developing of the service providers policies, practices and procedures governing the provision of goods and services to members of the public, shall be trained on the following:
- How to interact and communicate with persons with various types of disability.
- How to interact with persons with disabilities who use assistive devices or require the assistance of a guide animal, or a support person.
- How to use equipment that is available on premises that may help in the provision of goods or services.
- What to do if a person with a disability is having difficulty accessing the provider's goods or services.
- Information on the policies, practices and procedures governing the provision of goods and services to people with disabilities.
- Contracted employees, third party employees, agents and others that provide customer service on behalf of the Town of South Bruce Peninsula must meet the requirements of Ontario Regulation 429/07 regarding training.
- In accordance with Ontario Regulation 429/07 a document describing the training policy, a summary of the contents of the training and details of training dates and attendees must be submitted to the Town of South Bruce Peninsula upon request.

Inclusion

All reference to masculine will also be understood to include the feminine and all reference to feminine will also be understood to include the masculine.

All references to singular shall also be understood to include the plural and all references to the plural will also be understood to include the singular.

8.0 Approval and Contract

- All proposal submissions as described herein are subject to the approval of the Town:
- As required under the Purchasing Policy;

- Subject to the availability of funding/budget;
- Subject to the scoring/ranking as provided herein;
- Subject to Council appointment by by-law;

And;

- Subject to execution of an agreement (contract) between the parties.
- The Town of South Bruce Peninsula reserves the right, in its sole discretion, to enter negotiations with one Proponent or with any Proponents concurrently. In no event will the Town be required to offer any modified terms to any Proponent prior to entering into a contract, and the Town will not be liable to any Proponent as a result of such negotiations.

9.0 Confirmation Statement

Your signed “Statement by Bidder” form 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 request for proposal document(s). Your signed “Statement by Bidder” form confirms that you have checked and confirmed your pricing and by signing the form, you agree that you have not omitted any items from your proposal submission and you will be bound by law to supply the services as specified at the prices proposed should you be the successful Respondent.

If a proposal submission is a joint submission of two (2) or more professionals or professional firms, one single proposal is to be coordinated and submitted by the lead with the required information. All contributing professionals or professional firms shall be noted in the proposal submission.

Statement by Bidder

Bid Document Name: _____

Bid Document Number (if applicable): _____

1. I/We have reviewed all terms and conditions of all forms included as part of this bid package.
2. I/We have read and understand all of the terms and conditions of the forms included as part of this bid package.
3. I/We understand that if our bid is successful, all requirements of the successful bidder as outlined in this bid document will be completed by the time and in the format required.

Dated at _____ this _____ day of _____ 2020.

Witness

Signature of Authorized Person

Name of Authorized Person

Position