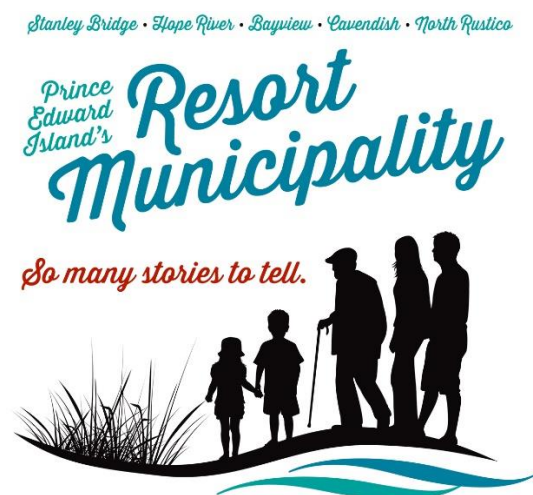


REQUEST FOR PROPOSAL

Lucy Maud Montgomery Destination Development Consulting Services

For

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North
Rustico



Closing: June 7, 2018 at 4:00 pm local time.

NOTE: An optional information session/site meeting will be held on Friday, May 25,
2018 at 10:00 am local time

Interested parties are asked to meet at the Heritage Park in Cavendish.

May 14, 2018

REQUEST FOR PROPOSAL

Lucy Maud Montgomery Destination Development Consulting Services

The Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico ("the Municipality") is seeking proposals from qualified individuals/ firms to provide Lucy Maud Montgomery Destination Development Consulting services. The selected firm will undertake the development of detailed design work and preparation of tender documents for the development of an innovative Lucy Maud Montgomery Experience located in the center of historic Cavendish and throughout Prince Edward Island. The Experience will provide residents and visitors with digitally and physically connected opportunities to learn about Montgomery and live through her eyes. The Experience design will be prepared in accordance with plans prepared by the Municipal Heritage Park and Historical Centre Committee, hereafter called the Committee.

Sealed Proposals, one (1) unbound and duly signed copy and one (1) in digital format on flash drive of each of the technical and price components are to be submitted and labelled **Lucy Maud Montgomery Destination Development Consulting Services, Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico** and delivered to 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0

All questions concerning the procurement process shall be directed to Brenda MacDonald, CAO of the Municipality at (902) 963-2698, Monday through Friday, 8:30 A.M. to 4:30 P.M. or by E-mail to resortmunicipal@eastlink.ca.

The Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever in its opinion best serves the interest of the Municipality.

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SECTION 1. INSTRUCTIONS TO PROPONENTS

1. General Instructions

This Request for Proposal ("RFP") document and any addenda may be obtained in person or by mail from Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0 or by E-mail at resortmunicipal@eastlink.ca.

All proposals are to be submitted in accordance with this RFP document.

All proposals are to be submitted in sealed, plainly marked envelopes. Proposals sent by facsimile or e-mail will not be accepted.

Additional information or clarifications of any of the instructions or information contained herein may be obtained from the CAO.

Any proponent finding any discrepancy in or omission from this RFP, in doubt as to the meaning of any provision(s) herein, or feeling that the RFP is discriminatory, shall notify the Municipality in writing within five (5) days of the scheduled opening of proposals. Inquiries and exceptions taken by proponents in no way obligate the Municipality to change the RFP; however, any interpretations given by the Municipality and any changes made to the RFP will be reflected in addenda duly issued by the Municipality.

The Municipality will assume no responsibility or liability for oral instructions or suggestions. All official correspondence regarding the RFP should be directed to the CAO.

All proposals must be signed by an authorized signatory of the proponent.

The Municipality reserves the right to make additional copies of all or part of each proponent's proposal for internal use.

Proposals will be publicly acknowledged. Proponents will be advised of the results after an evaluation of all proposals has been completed and a successful proponent has been determined.

2. Eligibility

Prospective proponents are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of the Municipality, give rise to conflict of interest in connection with this RFP or the Services required. Proponents are to submit with their proposal documents a description of any issue that may constitute a conflict of interest violation for review by the Municipality. The Municipality's decision on this matter will be final.

Individuals and entities engaged by the Municipality to draft any component of this RFP (and anyone affiliated with such individuals and/or entities) are not eligible to submit proposals for this RFP.

3. Proponent's Qualifications

No contract will be awarded except to responsible proponents capable of providing the Services.

Proponents must be primarily engaged in providing the Services as outlined in this RFP.

Proponents must have an extremely comprehensive understanding of the subject matter in this RFP. Such understanding and previous experience in all aspects of similar projects are essential criteria in the qualifying process. The Municipality reserves the right to consider past performance on contracts in the evaluation of a proponent's qualifications.

Proponents must have a proven record of having provided similar services. The Municipality reserves the right to check all client contacts furnished and to consider the responses received in evaluating proposals.

Proponents must use personnel and management knowledgeable in their areas of expertise. The Municipality reserves the right to perform investigations as may be deemed necessary to ensure that competent persons will be used in the performance of the Services.

4. Reservations

The Municipality reserves the right to reject or accept any or all proposals or parts of proposals. The Municipality may waive formalities or technicalities in proposals as the interest of the Municipality may require. The Municipality may waive or correct minor errors, omissions and inconsistencies in proposals provided they do not violate the proposal intent.

Under no circumstances shall the Municipality be liable for any losses or damages arising from the Municipality's rejection or acceptance of any proposal for any reason whatsoever. Notwithstanding the foregoing, the Municipality's liability for any losses or damages resulting from the Municipality's failure to fulfill any of its explicit or implied obligations under the RFP, including the Municipality's acceptance of a non-compliant proposal, or the Municipality's awarding of a contract to a non-compliant proponent shall in all circumstances be limited to the lesser of actual damages suffered or \$1,000.00

5. Proponents Expenses

Proponents are solely responsible for their own expenses in preparing, delivering or presenting a proposal.

6. Exceptions

The submission of a proposal shall be considered an agreement to all the terms and conditions provided herein. Any proposal containing exceptions to the terms and conditions of the RFP or the resulting contract may be rejected by the Municipality for non-compliance. Any request for changes to the terms and conditions of the RFP or the resulting contract must be made in writing to the Municipality prior to the date of closing. Only if the Municipality issues a formal addendum to the RFP will any changes to the RFP or resulting contract be effective.

7. RFP Administration

All questions concerning the procurement process shall be directed to Brenda MacDonald, CAO of the Municipality at (902) 963-2698, Monday through Friday, 8:30 A.M. to 4:30 P.M. or by E-mail to resortmunicipal@eastlink.ca

8. Existing Conditions

Each proponent must completely satisfy themselves as to the exact nature and existing conditions of the requirements and for the extent and quality of the Services to be performed. Failure to do so will not relieve the successful proponent of their obligation to perform the Services in accordance with the provisions of the contract.

9. Information Session

There will be an optional information session on Friday May 25th at 10:00 am local time at the Heritage Park in Cavendish.

10. Questions

The proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open. Questions should be directed in writing to the contacts identified in this document. Email is the preferred method of contact. Verbal questions and responses that are not later confirmed in writing will not be considered an official response.

Questions and responses that are deemed to affect the RFP requirements, project scope, time lines, etc. or to be of interest to proponents may be made available via Addenda at the discretion of the Municipality.

11. Addenda

Any addenda issued by the Municipality shall be posted on the Government of PEI tendering website at:

<https://www.princeedwardisland.ca/en/tenders>

The proponent must monitor the website for any addenda that may be issued during the full open period of the RFP.

The submission of a proposal shall be deemed to indicate that the proponent has read, understood and considered all addenda posted to the Government of PEI tendering website prior to the closing date and time.

12. Currency and Taxes

Prices are to be quoted in Canadian dollars, inclusive of duty (where applicable) and exclusive of HST.

13. Public Information/Proprietary Information

The Municipality is committed to full transparency. Any document submitted to the Municipality in response to this RFP is subject to this principle and proponents should be aware that any member of the public is entitled to request a copy of the document. In response to such a request, the Municipality may disclose some or all the information of the proposal.

The Municipality may, in the future, be subject to new provincial requirements creating obligations for the Municipality and its service providers when personal information is collected, used or disclosed.

By submitting a proposal, the proponent agrees that the Municipality may disclose the following sections of the proposal without notification to the proponent:

1. Form of Proposal
2. Executive Summary
3. Proponent's fixed total cost (if applicable)

14. Period of Submission Validity

Unless otherwise specified, all proposals submitted shall be irrevocable for ninety (90) calendar days following the closing date.

15. Surety

Bid Surety, Performance Surety and/or Labour and Materials Surety may be required in relation to this RFP and the resulting Contract.

16. Disputes

In cases of dispute as to whether an item or service proposed meets the RFP requirements, the decision of the Municipality shall be final and binding.

17. Disqualification for Inappropriate Contact

Any attempt on the part of a proponent or any of its employees, agent, contractors or representatives to contact any of the following persons with respect to this RFP or the Services prior to contract award may lead to disqualification:

- any member of the evaluation team or any expert advisor to them;
- any member of Council; and
- any other member of the Municipal staff.

18. Proposal Submission

The submission of a proposal will be considered as a representation that the proponent has carefully investigated all conditions which may affect or may, at some future date, affect the proponent's performance of the Services as described in this RFP and that the proponent is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; also, that the proponent is familiar with and will abide by all Federal and Provincial laws and regulations and all bylaws and policies of the Municipality which in any way affect the performance of the Services or persons engaged or employed in the performance of the Services.

SECTION 2: REQUEST FOR PROPOSALS

1. Project Background

The Issue

Lucy Maud Montgomery is an international literary icon. Her most famous novel *Anne of Green Gables* was written in Cavendish, Prince Edward Island and published in 1908. Cavendish is the home of numerous sites related to Montgomery, her life and her work. Yet, ironically, there is little or no connection among those sites. Among them, are her Cavendish Home and the pastoral land around it, Green Gables Heritage Place, the Cavendish Cemetery where she is buried, the Green Gables Post Office, and various monuments, trails, and landscapes.

Visitors, coming to experience all that is Montgomery in Cavendish, have nothing to guide them from point a to point b. There is no distinct signage, no constant and historically accurate information relayed among the properties. There is no complete experience described either in print or digitally. The experience can be disjointed and frustrating for those trying to understand the difference between the reality and the fiction, the sense of place and the sensory experiences that inspired her.

Further to that, Montgomery was strongly influenced by the history of her community along with some of the major events that marked her life. For example, she often spoke of the founding families, their characteristics and their contributions. She experienced the sinking of the Marco Polo ship off the shore of Cavendish.

As researchers have shared their understanding of her life as written in her journals and with the arrival of a new television series, Montgomery is also now becoming more recognized as a woman ahead of her time, who was, in her own way a feminist and who faced many challenges of her own.

Finally, it is also important to learn about many other areas on Prince Edward Island that contributed to who she was and influenced her writings. Many authors of her caliber are recognized through literary tours, where visitors get to experience and build understanding of an author. Yet again, this is an important cultural component that is sadly missing for students, researchers, visitors and residents alike. The province is dotted with significant sites relating to Montgomery in some way and a connected well adjudicated literary tour would increase our appreciation and understanding of this Canadian icon.

The Challenge

The Municipality is thus seeking proposals to correct the issues identified above. The main goal is to preserve and recognize Montgomery and all that touched her and the community. Experiencing Montgomery in connected, creative and innovative ways that will launch a new experiential product for visitors is essential. It is expected that proponents will design an important new touring product that honours Montgomery, the community and the culture of place.

Proponents should be able to put together

- the physical spaces,
- the story of those spaces and the community,
- the trails and connections,
- innovative programming,
- technologies that support learning and information,
- alternate methods of understanding and exploring,
- interactive and relevant experiences, and
- clear and strong motivational reasons for visitors to travel.

Considerations

Anne of Green Gables is arguably Canada's most recognized literary production. It has spawned multiple movies and television series starting in 1919 as a black-and-white silent film directed by William Desmond Taylor, produced by Realart Pictures and starring Mary Miles Minter as Anne Shirley. It is based on *Anne of Green Gables* and is considered a lost film. How fitting would it be to launch this project on the hundredth anniversary of this film?

Anne of Green Gables: The Musical is a musical based on the novel *Anne of Green Gables* by Lucy Maud Montgomery. The musical has been performed annually ever since 1965, and in March 2014, the production was officially recognized as the longest running annual musical theatre production in the world by Guinness World Records. 2.3 million people have seen this production in Charlottetown and another million worldwide.

Port Charlottetown is hoping to break the 100,000-cruise-ship-passengers mark this season. The majority of those passengers participate in a tour that includes Green Gables Heritage Place and other Montgomery sites. Green Gables Heritage Place is Prince Edward island's busiest attraction with over 254,000 visitors in 2017.

The business case for improving visitor experiences is strong. Yet, as Islanders, too many have taken an "oh hum" attitude towards this internationally recognized author. This project is meant to re-ignite the product and to also create a stronger sense of pride and recognition of an Island cultural symbol.

Some of the physical community assets that would be part of this project include the Heritage Park. The Heritage Park is a 1.52-acre park located on route 13 in the historic centre of Cavendish. It was originally part of the Macneill homestead where Lucy Maud Montgomery lived with her grandparents while writing *Anne of Green Gables*. Over time it also was home to the Cavendish school and the Cavendish Visitor Information Centre. Now, as a historic municipal Park, it is possible to redevelop the Park into an appropriate heritage commemoration site.

The Municipality is very much influenced by the desire to honour the founders of the community and its famous author, to provide connecting paths and spaces in the historical centre and to have a space where residents and tourists alike can learn about Montgomery, the community and have new connected and interactive experiences. The Municipality and its partners also wish to commission a statue of Lucy Maud Montgomery to be integrated into the space.

The Park is an important and strategic piece of public open space functioning as the southern gateway into the community. It links public sidewalks from the Cavendish cemetery, trails from Green Gables Heritage Place, and an entrance into the original homestead of Lucy Maud Montgomery. Green Gables Post office is also nearby. It is the desire of the Municipality to preserve and reinforce the sense of history, culture and connection to all these pieces and to allow the public to appreciate these both physically and digitally.

The Municipality, as part of this project, wishes to also ensure the safety of pedestrians transiting between all these sites. The proponent will need to examine how best to allow for safe circulation of pedestrians. As part of this work, the proponent will also be asked to look at two other possible areas where pedestrians could cross the road more safely.

The key features of the Park and connecting sidewalks and paths should include consideration of the following components:

- monument, stonewall or other form of recognition for each of the founding families
- safe access onto Route 13
- Experiential Tourism – Victorian garden, opportunities for family photos, backdrops, trees and hedges something to create an authentic experience
- Dedicated space for a statue, sculpture or representation piece of Lucy Maud Montgomery
- Innovative ways to convey information rather than only signs and panels with information
- Natural peaceful play elements
- Washrooms
- Accessibility
- Lighting
- Parking for cars and motor coaches
- Shelters with a place for people to eat and maybe a barbecue area
- Visibility

The Committee will advise the proponent on possible considerations and the proponent will be expected to consult with the community up to two times when drafting plans. However, the Committee can offer the following suggestions among others to proponents:

- Lucy Maud Montgomery loved cats, so perhaps something in a garden dealing with cats
- Understanding how Montgomery is seen on and off Prince Edward Island
- Playing on the feminist icon that Montgomery was

- Working on mental health issues. How can this physically be captured in the space?
- Connecting to or becoming a starting point for the literary tour
- Music and a play area for people to be able to play, tell stories or do small concerts. Some kind of component around music
- make it educational and a learning place for all ages
- a peaceful place for seniors to visit with interactive displays for all ages

Some of the physical assets located elsewhere in the Province that would be part of a literary tour include Lucy Maud Montgomery's birthplace in New London, the Anne of Green Gables Museum at Park Corner, Kensington Rail Station, Bideford Parsonage Museum, and more. The proponents would be expected to work with an adjudicating committee including the L. M. Montgomery Institute to select culturally appropriate sites to be included in a tour and to develop a standard form of experience for the tour. Interactive technologies in multiple languages could be a solution but proponents will be expected to propose best solutions for residents, students and visitors.

Less tangible assets available to the project include a vast amount of research that will need to be synthesized and made relevant for visitors, living experts such as Betsy Epperly and Jennie Macneill, existing marketing brands such as those of Tourism Cavendish Beach, and visitor profiles available from Tourism PEI.

2. Goal

The goal is to develop a high-quality visitor experience that honours Lucy Maud Montgomery and her legacy in the community, the province and the world over while at the same time recognizing the role and history of the community.

It is expected that proponents will:

- map out existing concepts and conditions and explain how these will be addressed;
- design an authentic and experiential product;
- integrate new and exciting technologies into the experience;
- consider all infrastructure requirements;
- consider the open space needs of a high-density tourism area while preserving the cultural and heritage qualities of the community;
- design concept plans for any physical space that is part of the experience;
- design a space and experience that integrates seamlessly and connects the attractions and circulation areas;
- develop a LMM literary tour product inclusion adjudication process and criteria along with partners, and
- prepare documents for tendering of the redevelopment of the park, commissioning a statue and any other elements that would be part of the project.

3. Objectives/Critical Path

The municipality has scheduled all work to be completed by June of 2019. Thus, it would be important to have this design phase completed by fall of 2018 in order to ensure completion of the entire project by June 2019.

This entails:

- Any technology development design related to the project;
- Any branding design related to the project;
- Any design related to the literary tour;
- Any physical development including pathway realignment, site furnishings, lighting, soft landscaping and planting, site re-grading, statue, monument or structure construction or installation.

4. Requirements

The successful proponent must have demonstrated experience in

- park/attraction design and construction,
- tourism and/or cultural product development,
- innovative design of interactive experiences, and
- historical and cultural preservation and promotion

5. Constraints

The budget for this project is constrained. It will be the responsibility of the Proponents to determine, in consultation with municipal staff, the limits of scope for the various phases so that the budget limits are respected. Proponents will be expected to explore possible revenue generating opportunities from operations to ensure the future sustainability of this project.

6. Project Framework

Municipal staff and the Committee will provide the following resources:

- Community consultation venues and organization,
- Public engagement notes during consultations and Committee Meeting Notes,
- Various Historical References, and
- List of specific subject experts to be interviewed. (Maximum 8)

7. Detailed Scope of Consulting Services

Detailed Design and Tendering for the first phase of development consisting of:

- Working drawings and specification documents to be submitted to the municipality for tendering;
- Preparation of addenda as may be required during tendering and including supplementary drawings, specifications, instructions and notices of changes;
- Detailed specifications for tendering of any technological utilities;
- Cost estimates prior to tendering;

Provision of Contract Administration required for the project including:

- Preparation and issue of documents to describe and value the work to be completed;
- Notification to the municipality of any changes in the contract time;
- The receipt, review and annotation of drawings, specifications, texts, etc., and the return of copies to contractors/developers;
- The review of samples and prototypes and consultations with the municipality;
- Issuing instructions to the municipality and the sub-contractors/developers under the contract;
- Liaison with and coordination of consultants;
- Attend project coordination and committee meetings;

8. Project Management

The proponent shall designate in their proposal, a project manager/lead consultant. All coordination for services with the Municipality and the proponent shall be the responsibility of the project manager/lead consultant. The project manager/lead consultant shall ensure that any substitutions in proponent team personnel are approved by the Municipality.

The project manager/lead consultant will report to the Municipality through a review process and meetings at various stages of the work program. The work progress shall be measured against a defined budget and work schedule.

The Municipality recognizes that project management is an essential part of this project, therefore a written monthly progress report is required to be submitted and consist of the actual schedule achieved overlaid on the original base schedule submitted by the proponent at the start up meeting. For instances where the schedule has not been achieved a brief written explanation as to why shall be included. The progress report can be submitted either as a hard copy or as an attachment to an electronic e-mail.

Meet and liaise with regulatory bodies, utilities, stakeholder groups, other levels of government, and members of the community, as required.

Provide copies to the Municipality of all correspondence related to the project including agreements reached on behalf of the Municipality.

9. Reporting and Deliverables

Reports, drawings, and calculations shall be in metric units. Reports and drawings shall be stamped, as required, by a Professional Landscape Architect and/or by a Professional Engineer registered to practice in Prince Edward Island. Drawings shall be to a scale appropriate to the design depiction and shall comply with the Municipality's standards.

Electronic copies of all information (reports, drawings, and calculations; e.g., spreadsheets, computer model data files, etc.) shall be provided to the Municipality on a USB flash drive. All reports are to be provided electronically, each as a single PDF file that includes the report text and all figures, diagrams, and drawings presented. In addition, drawings shall be provided in AutoCAD Current Version format and reports shall be provided in Word format.

All material produced, and information collected by the proponent in performance of this terms of reference shall become the property of the Municipality. All material shall be kept confidential by the Proponent unless authorized in writing by the Municipality.

Where included in the scope of work, cost estimates are required and are to exclude HST.

SECTION 3 -SUBMISSION REQUIREMENTS

The submission of a proposal is considered as a representation that the proponent has carefully investigated all conditions which may affect or may, at some future date, affect the performance of the services covered by the proposal, the areas as described in this RFP and that the proponent is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; that the proponent is familiar with all Federal and Provincial laws, all bylaws and policies of the Municipality which in any way affects the prosecution of the work or persons engaged or employed in the work.

In responding to this proposal, each proponent shall include, as a minimum, a Business Technical Proposal and a Cost Proposal. The proposal is not complete unless it contains a Business Technical Proposal which addresses the requirements described herein, and a separate Cost Proposal that details all costs for the proposed services. Both the Business Technical Proposal, which shall be identified as envelope #1, and the separate Cost Proposal, which shall be identified as envelope #2, shall be submitted simultaneously. Both Technical and Cost Proposal must be signed by an authorized representative of the firm submitting.

Sealed Proposals will be received by Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0.

The Business Technical Proposal shall be evaluated in step 1. No details of costs or rates are to be included in this part of the Proposal.

The Business Technical Proposal shall include the Form of Proposal and a cover letter. Proposals are limited to 25 pages, excluding forms, schedule, person-hours matrix, cover letter, addendums and appendices. A page is defined as a single-sided sheet of 8.5" by 11" paper. The only exceptions to this will be the project schedules, flowcharts and/or person-hours matrix, which may be submitted on 11" by 17" paper.

One (1) unbound and duly signed copy and one (1) in digital format on flash drive of each technical and price components are to be submitted. Technical and price components must be submitted in separate envelopes and as separate digital files on separated drives.

Elaborate brochures or voluminous examples are neither required nor desired. No project data sheets or company brochures are to be submitted. Resumes may be referred to in an appendix.

Digital copies of the Proposal must not be larger than 10mb.

Proposals are to be typed using a font size no smaller than 10 pt. (except for footnotes and endnotes) and using a portrait page layout. Column format is not to be used.

In the case of a joint venture or for sub-contractors, commitment letters shall be appended in the Proposal. Letters of commitment from member firms on their own letterhead and signed by an officer of the company affirming their commitment to this assignment and their role. Substitutions, deletions or altering of roles of key personnel will not be allowed without written authorization from the Municipality.

1. Business Technical Solution Submission Requirements

Submissions should include, but not necessarily be limited to, the following:

Mandatory Requirements- The proponent must demonstrate that they meet or will meet upon award the following mandatory requirement:

Evaluation Criteria #1- Communication Skills: The proposal should be clear and readable.

Information should be easy to find and should be in the order presented hereunder.

Evaluation Criteria #2- Team Composition and Experience

Sector Specific Experience: The proposal should clearly state the proponent firm's overall experience in the field of expertise required by the scope of work. A combination of firms is acceptable, but one firm must be the primary bidder. The Proposal shall include at least three (3) examples of recent projects as well as three (3) letters of reference or relevant client contact information. Proponents must be able to demonstrate that the firm has an in-depth knowledge of the scope of this assignment. The purpose of this information is to demonstrate the Proponent's experience and ability to complete similar projects, develop creative solutions, resolve complex issues and communicate effectively with various parties and audiences.

Experience of Project Lead with projects of similar scope and size: The Proposal shall include a summary of the relevant experience as it relates to their role in this assignment. A brief description (years in business, services provided, number of employees, etc.). Additionally, the Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable.

Key Team Members' appropriate skills and education: The Proposal shall include, as appendices a CV detailing their experience, skills and education in relation to this assignment.

Demonstrated history of proposed Team: The Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable. Additionally, the Proposal shall demonstrate the history of the member firms and individuals successfully delivering assignments of comparable size and scope as a team.

Balance of level of effort: The proponent shall provide a proposed schedule to complete the tasks in the proposed work plan as well as a person-hours matrix *without fees* outlining the hours each team member has allocated to each of the tasks in the proposed work plan. No hourly rates, dollar figures or costs shall be shown on this person/hours matrix breakdown; inclusion of any pricing information may result in disqualification of your Proposal.

Evaluation Criteria #3 – Understanding of the Municipality's Needs

Understanding of the Requirements of the Scope of Work: Proponents shall provide a demonstrated understanding of the subject matter, including, but not limited to, the scope of work as well as the approach that will be taken to accomplish the Services related to this RFP document, as well as an indication of possible challenges and solutions not directly referenced in the Request of Proposals.

Acceptable Proposed Schedule and Work-plan: Proponents shall provide a work plan which clearly outlines milestones and timelines to demonstrate how the work will progress to the desired completion date. Proponents must present a realistic timeline of the proposed Project schedule. The schedule shall reflect the tasks in the work plan and will be updated monthly to reflect project progress and shall be submitted to the Municipality's Project Lead with the contractor's status report.

Value added propositions and recommendations: Proponents shall demonstrate an innovative approach to the completion of the assignment, utilizing all potential resources available to them.

Attention to Relevant Challenges: Proponents shall describe and attempt to address any challenges to the assignment which they have identified but may not be spoken to in the RFP.

Evaluation Criteria #4 – Business/Technical Solution

This criterion is evaluated based on a global view of the proposal and further analyses the entire proposal in relation to achieving a complete and comprehensive solution from the Successful Proponent.

Business/Technical Solution: The proposal must address all of the business aspects of the engagement as identified in the RFP.

Methodology: The proposal must combine proven project methodology and include innovative approaches and ideas in the delivery of the project. Proponents should keep this in mind when submitting similar successful projects for review under Criteria 1.

Flexible and Scalable Solution: The proposal shall offer all of the services required to successfully deliver the project but should present a schedule that allows for adjustment, addition and/or deletion of specific activities as necessary to reflect budget availability.

Cost and Time Effectiveness: The proposal shall indicate how the successful proponent will effectively use the Municipality's internal resources.

Evaluation Criteria #5 – Project Management Methodology

Management Structure: The Proposal shall include an organizational chart indicating a clear reporting structure and escalation methodology.

Proposed Communication Methods: The proposal shall also indicate the number and frequency and method (i.e.: in person, web-conference, tele-conference, etc.) of the anticipated meetings. Meeting dates should also be included in schedule per requirements of section.

Quality Assurance Standards: A description of Proponents Quality Assurance methods and practices should be included.

2. Evaluation of the Business/Technical Proposal

Stage 1 – Mandatory Criteria

The proposal must meet any and all of the mandatory criteria as referenced in the Scope of Work and clearly demonstrate that these are met in a substantially unaltered form. If the proposal fails to meet any one of these criteria, it will receive no further consideration during the evaluation process and be deemed non-compliant.

The proposal must clearly demonstrate the proponent's experience and ability to fulfill the Service Requirements.

Stage 2 – Proposal Evaluation Criteria

All proposals which pass Stage 1 – Mandatory Criteria will be evaluated and ranked against the weighted Proposal Evaluation Criteria. Proponents are reminded that the proposal is the main document used in the evaluation and to include all required and pertinent information in their proposal. Proposals not achieving a minimum of 75% of the total available technical points will no longer be considered and the Cost Proposal will be returned unopened.

To assist in the evaluation of proposals, the Committee may, but is not required to:

Contact any or all of the client/customer contacts cited in a proposal to verify any and all information regarding a proponent and rely on and consider any relevant information obtained from such references in the evaluation of proposals;

Conduct any background investigations that it considers necessary and consider any relevant information obtained from such investigations in the evaluation of proposals;

Seek clarification from a proponent only if certain information in their proposal is ambiguous or missing and such clarification does not offer the proponent the opportunity to improve the competitive position of its proposal.

3. Cost Proposal Requirements

The cost proposal shall be submitted at the same time as the technical proposal as a separate document in a separate sealed envelope

The Cost Proposal shall include a single page duly signed stating the proponent's firm fixed total price for this service as outlined in the Request for Proposal.

Proponents should include within the Cost Proposal on a separate page or pages, a detailed listing of the tasks and activities with a breakdown into work packages, details of all individual costs of the proposed services, and total costs (Fixed firm). The cost proposal is to be a separate document.

The total cost shall represent the maximum payment for the project. Price data should include fixed price, estimated hours of work by key staff and individual hourly cost for staff. Include and identify expenses and HST separately. Price may not be the determining factor for award.

4. Evaluation of the Cost Proposal

The proposal with the lowest cost shall receive the maximum points allocated for cost in the Evaluation Scoresheet. All other proposals will be prorated using the lowest cost bid and the following formula:

Max Available Pts. - $[\text{Max Available Pts.} \times (\text{total cost} - \text{lowest total cost}) / \text{lowest total cost}]$

Note: If the result is a negative number, the score assigned will be 0

Example: Two technically compliant bids are received and the maximum available points for cost equal 30:

Bid 1: \$40,000

Bid 2: \$50,000

Bid 1 being the lowest, would achieve a score of 30 points

Bid 2 would achieve a score of 22.5 points, calculated as follows:

$30 - [30 \times (\$50,000 - \$40,000) / \$40,000] = 22.5$

5. Award of Contract

The Municipality reserves the right to modify the terms, or cancel, or reissue the RFP at any time at its sole discretion.

Any selection is subject to funding availability.

The RFP should not be construed as an offer or a contract to purchase goods or services. Although proposals will be assessed in light of the evaluation criteria, the Municipality is not bound to accept the lowest priced or highest scoring proposal or any proposal. The Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever, in its opinion, best serves the interests of the Municipality.

Subsequent to the submissions of proposals, interviews may be conducted with some of the proponents, but there will be no obligation to receive further information, whether written or oral from any proponent.

The Municipality will not be obligated in any manner to any proponent until a written contract has been duly executed. Any damages arising out of a breach by the Municipality, including damages for any implied duty at law, are limited to the lesser of the proponent's actual costs of preparing their proposal and \$1,000. Neither acceptance of a proposal, nor execution of a contract, will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any statute, regulation or by-law.

The Municipality offers debriefings to unsuccessful proponents. An unsuccessful proponent must request a debriefing in writing within 10 (ten) days from the date of the Municipality posting the award on the Government of PEI Public Tenders website. Upon timely receipt, the Municipality will contact the interested proponent to arrange a date, time and place for the debrief, which normally will be conducted in person.

6. Method of Award

The evaluation process will be carried out by the Committee who shall establish the ranking of all the proposals and may produce a short list. The short-listed proponents may be invited to make a brief presentation. The evaluating committee will make a recommendation based on the evaluation of the technical and cost proposals, the presentation if offered, and any clarifications made by the proponent during the evaluation process.

APPENDIX A
EVALUATION CRITERION SCORE SHEET

CRITERIA	SUMMARY (Considerations may include but are not limited to the following)	SCORE
Communication Skills	Clarity and readability of proposal	/5
Team Composition and Experience	Sector specific experience of the Proponent Firm Balance of level of effort vs. team roles (project management, technical, etc.)	/20
Understanding of the Municipality's needs	Understanding of the requirements of the scope of work and the Municipality's organizational structure Acceptable proposed schedule and work plan Value added propositions and recommendations Attention to relevant challenges that the Committee has not considered	/20
Business/Technical Solution	Solution addresses all anticipated aspects of the project as identified in the RFP Solution draws on proven methodology Solution is flexible and scalable Solution is cost and time effective in its use of the Municipality's resources	/20
Project Management Methodology	Management Structure within Proponent's organization and project team Proposed communication methods between Proponent team and Municipality Quality assurance standards and practices	/5
Sub-Total		/70
Cost		/30
Total		/100