



REQUEST FOR PROPOSALS

NS-201901

FOR A REVIEW AND UPDATE OF THE RURAL MUNICIPALITY OF NORTH SHORE'S

OFFICIAL PLAN AND ZONING AND DEVELOPMENT BYLAW

RURAL MUNICIPALITY OF NORTH SHORE

2120 ROUTE 25

YORK, PE

COA 1P0

PROPOSALS DUE: APRIL 18, 2019



1.0 GENERAL

The following is a request for proposals for the provision of planning services to the Rural Municipality of North Shore. The requirements of the submission are outlined in Section 4 – Proposal Requirements and Evaluation, and the requirements and objectives of the project are outlined in the Terms of Reference.

1.1 Definitions

The Municipality: The Rural Municipality of North Shore, Prince Edward Island.

The RFP: This Request for Proposals for the provision of planning services.

The Proponent: The firm submitting a proposal in response to this RFP.

The Project: The work and services that are described in the Scope of Work of this Request for Proposal.

1.2 Introduction

The Rural Municipality of North Shore is requesting proposals from qualified proponents for the provision of planning services to undertake a review and update of the Municipalities Official Plan and Zoning and Development Bylaw.

1.3 Context

The Rural Municipality of North Shore brings together West Covehead, Covehead Road, Stanhope, Grand Tracadie and Pleasant Grove with historical roots going back two centuries and more. Founded on rich traditions of community organization, institution building, neighborliness and industry, the Community identifies with its productive land and sea resources and coastal setting and takes pride in its welcoming nature and hospitality. Situated between the PEI National Park and the Municipality of York to the North and East of Charlottetown, the Community has increasingly become a "bedroom community" for workers who commute to Charlottetown as well as a summer haven for Islanders and non-Islanders alike.

In the fall of 2018 the former Rural Municipalities of North Shore, Pleasant Grove and Grand Tracadie were restructured to become the Rural Municipality of North Shore. Pleasant Grove and Grand Tracadie did not have local land use Planning Bylaw and the Planning for these areas of the Community is currently managed by the Province of PEI. As part of the restructuring the Municipality of North Shore agreed to bring the former Communities under one Land Use Plan. North Shore's current Land Use Plan was for 2014- 2019 so is up for review. As part of the review and update of the Land Use Plan a

survey of the former Municipalities of Grand Tracadie and Pleasant Grove is required to document the current land uses in place.

Municipal Information

- Land Area - 17,593 Acres
- Total Properties -2,420
- Estimated Population - 2,000

2.0 INSTRUCTIONS TO PROPONENTS

2.1 Submission

The proponents shall submit five (5) copies of the sealed proposal, clearly labelled with the proponent's name and address, and the name of the project: "Review and Update the Rural Municipality of North Shore Official Plan and Development Control Bylaw".

Proposals shall be submitted using a two (2) envelope system. The first envelope shall include the technical proposal and the second envelope shall include the financial proposal. Each envelope shall be clearly marked as to its contents. Proposals not using the two-envelope system, or which do not have the envelopes clearly marked, may not be accepted and may be returned to the Proponent.

The proposals are to be submitted to:

Municipal Office
Rural Municipality of North Shore
2120 Route 25
West Covehead
COA 1P0

Attention: Jonathan MacLean
Chief Administrative Officer

No later than 2:00 pm on April 18, 2019.

Facsimile transmitted, electronic and late proposals will **not** be accepted.

2.2 Contact and Addenda

All inquiries concerning this Request for Proposal are to be directed to:

Jonathan MacLean

Rural Municipality of North Shore
2120 Route 25
York, PE
COA 1P0
Phone: 902-672-2600
Email: administrator@northshorepei.ca

To ensure consistency and fairness to all proponents, the Municipality will use written addenda to issue any clarifications or provide any further information in relation to this Request for Proposals. Any and all addenda will be published on the Province of PEI Tendering website (<https://www.princeedwardisland.ca/en/tenders>) by **April 11, 2019**. It is the responsibility of proponents to check the PEI Tendering website for any addenda to this Request for Proposals. Verbal explanations or instructions will not be binding.

2.3 Proponents Requirements

A proponent may be required to be registered to carry on business in accordance with applicable laws of the Province of Prince Edward Island if the proponent is selected as the successful proponent. The proposed Project Lead for the proponent's project team and the project team member who will serve as the Project Lead in case of a contingency must be a Full Member of the Canadian Institute of Planners (MCIP) prior to the commencement of the project.

3.0 TERMS AND CONDITIONS

- Submission of a proposal constitutes acknowledgement that the proponent has read and agrees to be bound by all the terms and conditions of this Request for Proposals and any addenda issued in relation to this Request for Proposals.
- The Municipality will not make any payments for the preparation of a response to this Request for Proposal. All costs incurred by the proponent will be borne by the proponent.
- This is not an offer. The Rural Municipality of North Shore does not bind itself to accept the lowest price, the highest scored, or any proposal submitted.
- The Municipality has the right to cancel this Request for Proposal at any time and to reissue it for any reason whatsoever, without incurring any liability and no proponent will have any claim against the Municipality as a result of the cancellation or reissuing of the Request for Proposals.
- The Municipality will not be responsible for any proposal that does not indicate the Request for Proposals name and the proponent's name.

-
- The Municipality will not be responsible for any proposal that is delivered to any address other than that provided in Section 2.1 of this RFP.
 - If a contract is to be awarded as a result of this Request for Proposal, it will be awarded to the proponent whose proposal, in the Municipality's opinion, provides the best potential value to the Municipality and is capable in all respects to perform fully the contract requirements and the integrity and reliability to assure performance of the contract obligations.
 - If the Municipality decides to award a contract based on a submission received in response to this Request for Proposal, the successful proponent will be notified of the intent to award in writing. Proponents will not acquire any legal or equitable rights or privileges whatsoever until the contract is signed by both parties.
 - In the event of any inconsistency between this Request for Proposal, and the ensuing contract, the contract shall govern.
 - The Municipality reserves the exclusive right to determine the qualitative aspects of all proposals relative to the evaluation criteria.
 - Proponents may not amend their proposal after the closing date and time but may withdraw their proposal at any time prior to acceptance by the Municipality and issuing of a Letter of Intent.
 - Proposals will be evaluated as soon as practicable after the closing time. No detail of any proposal will be made public except the names of all parties submitting proposals.
 - The proposal, accompanying documentation, and any project reports, drawings, etc. submitted by the proponents are the property of the Municipality and will not be returned.

3.1 Validity of Offer

The proposals shall remain open for acceptance for a period of not less than sixty (60) days from the closing date of this Request for Proposal.

4.0 PROPOSAL REQUIREMENTS AND EVALUATION

The Technical Proposal shall include all the information required to evaluate the proposal with the exception of the financial component.

The Technical Proposal will be used to evaluate the proponent's understanding of the project and methodology, and ensure they propose to meet the Terms of Reference and provide the required deliverables. It will also be used to evaluate the proponent's experience, and project team.

The requirements of this project are outlined in Section 6 -Terms of Reference.

4.1 Understanding of the Project

The proponent should demonstrate an understanding of the objectives of the work, technical requirements, constraints, selection of resources, and any special considerations associated with the project. The proponent should provide a description of the specific project objectives and technical requirements, highlighting those that are of particular significance to the project and delivery of services.

4.2 Work Plan/Project Methodology

The proponent shall provide a detailed work plan, which demonstrates the proposed project methodology. The work plan should demonstrate the proponents understanding of the project and its major challenges. It should describe how the proponent proposes to meet the objectives of the project and the requirements of the Terms of Reference, and provide the deliverables specified.

The work plan is the proponent's opportunity to present their project methodology as well as showing an understanding of the project. It is also their opportunity to present innovative ideas or approaches to the project.

4.3 Qualifications and Experience of Firms

The proponent shall present the firm(s) who shall comprise the Project Team. The prime consultant and any sub-consultants shall be identified, and the roles of all firms shall be described.

The proponent must demonstrate previous experience on projects of a similar scope and scale. A description of maximum of five (5) projects completed by the prime consultant, and three (3) for each sub-consultant shall be included. Descriptions of projects shall be limited to two single sided pages each including photographs and graphics.

The project descriptions should include:

- description of the project,
- key personnel and their roles and responsibilities on the project,
- client reference, including client name, email address and telephone number.

4.4 Project Team

The proponent shall present the Project Team's key personnel, including their roles and responsibilities, including the identification of the Team Lead and the project team member who will act in the capacity of the team lead in case of a contingency.

The proponent should demonstrate the experience and qualifications of the project team members to provide the services to fulfill the objectives and scope of work of this project as set out in the Terms of Reference. Their experience on similar projects should be demonstrated. The Project Team should demonstrate combined qualifications and experience in relation to land use planning including: data collection and management; visual analysis public engagement and community consultation; demographic, economic and intensification analysis; and policy formulation and implementation.

Curriculum vitae for each project team member and backup should be included. The qualifications and experience of each project team member shall be considered in the evaluation.

Information to be included for each project team member should include:

- Name
- Education (relevant)
- Work Experience
- Similar projects involved and role in this project
- Licensing, certification and/or authorization

4.5 Past Performance and References

As part of the evaluation of the submission, the Municipality shall review the proponents past performance on similar projects and their references from other clients for similar or related projects.

References shall be obtained from the descriptions of similar projects provided as part of Qualifications and Experience of Firm(s).

4.6 Project Schedule

The proponent shall provide a detailed schedule that identifies how and when the services shall be conducted, individual responsibility for each service, and demonstrate the project can be completed within the allotted time frame and within budget.

The project schedule will be evaluated based on how closely it meets the project requirements, and how it demonstrates a logical approach to delivering the required services.

4.7 Financial Proposal

The financial proposal shall be submitted in a separate envelope. The envelope shall be clearly marked "Financial Proposal" and include the project title. Failure to clearly mark the envelope may result in the proposal not being accepted.

The Municipality is requesting the work be undertaken on a per diem basis with an upset limit. The financial proposal shall clearly state the upset limit with HST shown separately.

Disbursements will be considered to be part of the upset limit fee. No additional invoicing for disbursements shall be accepted.

At no time shall the contract upset limit be exceeded without prior written authorization of the Rural Municipality of North Shore.

The financial proposal shall include a breakdown of all fees in the form of a Fee Schedule. The Fee Schedule shall be a matrix with project tasks on the vertical axis, and project personnel on the horizontal axis. The Fee Schedule shall show the corresponding value of work for each Project Team member and the disbursements relating to each task. In addition, per diem rates shall be provided for all Project Team members.

Disbursements will be reimbursed at cost and must be job related. Backup documentation for all disbursements is to be submitted with each invoice. Operating and overhead expenses will not be considered as a disbursement. The following are examples of acceptable and unacceptable disbursements:

Acceptable Disbursements: Travel
 Accommodations
 Meals
 Printing and Reproduction
 Communications (telephone bills)

Unacceptable Disbursements: AutoCAD Charges
 Computer Charges
 Equipment Charges (unless clearly
 identified in proposal)

4.8 Evaluation of Proposals

The evaluation of the proposals shall be based on the factors presented as follows in Table 1.

Table 1 EVALUATION RATING TABLE	
Rating Factors	Weight Factor
1. Understanding of the Project	5
2. Work Plan/Project Methodology	30
3. Qualifications and Experience of Firms	15
4. Project Team	15

5. Past Performance and References	10
6. Project Schedule	5
Subtotal Technical Submission	80
7. Cost of Services	20
TOTAL	
MAXIMUM TOTAL POINTS	100

4.9 Proposal Submission Format

Submissions shall meet the following formatting or they may not be evaluated.

- Paper Size - 8 ½" x 11";
- Minimum font size - 11-point Times or equal;
- Minimum margins - 12 mm top, bottom, left, and right;

5.0 TERMS OF PAYMENT

The selected proponent shall be reimbursed on a monthly basis for works completed. Monthly invoices shall include backup for all disbursements (time sheets will not be required but may be requested). The invoice shall include the project title, purchase order number, a description of the work completed, and a billing summary.

No payment will be made for the cost of work incurred to remedy errors or omissions for which the consultant is responsible.

6.0 TERMS OF REFERENCE

6.1 Background

The last Official Plan and Development Bylaw review for the Rural Municipality of North Shore was completed in 2014.

6.2 Scope of Work/Deliverables

The scope of work to be completed by the selected proponent as part of this project is summarized in the following sections. This scope of services is not to be considered all-inclusive. Tasks required to meet the project objectives will be considered to be required under this Terms of Reference unless they are deemed unforeseeable or are required to meet expanded project objectives.

The overall objective of the project is to review and update North Shore's Official Plan and Development Bylaw based on technical analysis and stakeholder input, and in compliance with the Planning Act and applicable Regulations. The scope of work includes the following high-level deliverables:

- Undertake a public consultation process to ensure meaningful feedback from the public, residents, business owners & operators and public and private developers informs the content of a revised Official Plan and Development Bylaw;
- Survey of properties in Grand Tracadie - 472 and Pleasant Grove - 393 to document current uses
- Assess the amount and characteristics of land supply in relation to residential, commercial, industrial, institutional and recreational trends and needs in the Rural Municipality of North Shore, to estimate demand for various land uses over a 15-year planning horizon and to inform the provisions of a revised Official Plan, Development Bylaw and associated mapping;
- Prepare a revised Official Plan and Development Bylaw that facilitates orderly growth, preservation, sustainability and economic development and address the following matters:
 - Review and update of the existing Official Plan for the Rural Municipality of North Shore, including its goals, objectives, policies and plan actions, present and future land use maps, and the timing of implementation;
 - Review and update of the provisions of the existing Development Bylaw for the Rural Municipality of North Shore, including but not limited to the requirements and processes pertaining to subdivision and development;
 - Ensure the development, over the life of the Official Plan and Development Bylaw, of a culturally and socially healthy community;
- Ensure the revised Official Plan and Development Bylaw are internally consistent as well as consistent with other Municipality Bylaws and policies and Council's priorities;

-
- Ensure the revised Official Plan and Development Bylaw conform with Provincial Legislation, regulation and policy, as may be amended from time to time, in particular taking into account recent amendments to the Planning Act and the implications of the new Building Codes Act and Water Act;
 - Prepare and provide all necessary documentation required by the Rural Municipality of North Shore for the approval and enactment of the revised Official Plan and Development Bylaw;
 - Prepare and provide a draft copy of the Official Plan and Development Bylaw in Microsoft Word and a PDF version;
 - Prepare and provide a final copy of the Official Plan and Development Bylaw in Microsoft Word and a PDF version;
 - Prepare, provide and deliver a presentation to Municipality Council at a public meeting on the completed project.

6.3 Documents

The following information and documents will be made available:

- Application and approval data regarding subdivision and development activity in the Rural Municipality of North Shore, as available;
- Any relevant maps and plans, as available;
- Rural Municipality of North Shore Zoning and Development Bylaw, and amendments thereto;
- Rural Municipality of North Shore Official Plan, and amendments thereto;
- Municipal Government Act; and
- Planning Act and Regulations and recent amendments thereto.

6.4 Selected Proponents Responsibilities

The Selected Proponents responsibilities will include, but not necessarily be limited to:

- Meet with Municipality Staff and Plan Review Committee to discuss the project requirements and work plan at the commencement of the project;
- Review and assess all relevant data and documents;
- Consult and coordinate with all relevant provincial government staff to ensure that the draft and final deliverables meet all review requirements and comply with all applicable enactments, as necessary;
- Report to Municipality staff regarding the progress and completion of the work plan, as required;
- Fulfil the requirements of the project as listed in the Scope of Work/Deliverables (Section 6.2 of this RFP)

6.5 Municipality 's Responsibilities

The Municipality 's responsibilities will include:

- Review proposals and select successful proponent;
- Enter into negotiations with the successful proponent;
- Provide selected proponent with existing information and reports where available;
- Review all deliverables and provide comments to the selected proponent.

6.6 Project Submission Formats

Draft and final reports shall be formatted to standard size paper (8 ½" x 11"), and may be double sided, unless otherwise directed.

6.7 Proposed Schedule

Request for Proposal Issued

March 28, 2019

Deadline for Inquiries

April 8, 2019

Deadline for Issuing Addenda	April 11, 2019
Submission of Proposal	April 18, 2019
Award of Contract	To Be Determined
Submission of Draft Official Plan and Development Bylaw	TBD
Submission of Final Official Plan and Development Bylaw	TBD