

# Request for Proposals

## Professional Services for a Strategic Plan for the Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico

*Stanley Bridge • Hope River • Bayview • Cavendish • North Rustico*

Prince  
Edward  
Island's  
**Resort  
Municipality**

*So many stories to tell.*



Date Issued: April 1, 2019

Submission Deadline: April 30, 2019 at 12:00 noon

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## 1. Invitation to Proponents

This Request for Proposals (RFP) is an invitation by the Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, hereafter referred to as the Resort Municipality, to qualified consultants and consulting firms to submit proposals to help the Municipality develop a Strategic Plan for the Municipality. The intent of this proposal call is to award a contract to the consultant or consulting firm that offers the Resort Municipality with the best overall value to complete the Scope of Work included in the Terms of Reference (Section 2).

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

## 2. Terms of Reference

### 2.1 Background

The existing Official Plan and Zoning and Subdivision Control (Development) Bylaw for the Resort Municipality were adopted in 2017. As per the *Planning Act*, the Municipality is required to conduct a review of its planning documents every five years. Recent regional economic, demographic and development trends also create a need for the Resort Municipality to ensure that community needs are identified and satisfied over the 15-year planning horizon referenced in the *Planning Act*. The Official Plan and Zoning and Subdivision Control (Development) Bylaw are the Municipality's primary tools to ensure that its policies are current and that land to support the Municipality's vision for growth is adequate, located strategically, and oriented to build upon the existing assets and strengths of the community. The existing Official Plan was simply updated from the previous plan to take into consideration any bylaw or policy changes that had taken place.

Council feels that a "blue sky" exercise needs to be completed to create a vision for the community before starting the process of developing its Official Plan. Although many documents are available to Proponents, it is the view of Council that a fresh approach needs to be taken because not much has changed in the Resort Municipality Official Plans since the first Official Plan was completed for the Resort Municipality in 1989 preceding incorporation. Many of the ideals listed in that plan still exist today. However, since that time, the Resort Municipality has grown significantly and the Municipality would like to take a leadership role with regards to questions of sustainability, environment, transportation and more. In other words, the Resort Municipality is looking to construct an updated modern vision for the community through a strategic

plan first. It will then proceed with the elaboration of its Official Plan after the strategic plan has been created.

The Resort Municipality encompasses several neighboring communities in the central North Shore area of Prince Edward Island with both permanent and seasonal residents. It is the only Resort Municipality on Prince Edward Island. This generally refers to an area where tourism or vacationing is the primary component of the local culture and economy. Tourism is the main export in our economy and is complemented by vibrant agricultural and summer residential communities.

The Resort Municipality is bordered on the east by the incorporated town of North Rustico, to the south and west by unincorporated communities with much the same interests as the Resort Municipality and to the north by the PEI National Park and Gulf of St. Lawrence.

There are approximately 280 permanent year-round residents. This increases to about 1,000 including seasonal residents in the summer months. In July and August, visitors within the Resort Municipality number over 10,000 visitors per day, with large events in the Resort Municipality attracting even significantly more visitors. The Municipality also operates a sewer utility. The Municipality receives fire services from the fire departments in North Rustico, New Glasgow and New London. Due to the visitor numbers in the summer months, there is a temporary RCMP office located in Cavendish.

The Resort Municipality has witnessed an aging population, fewer families and the arrival of newcomers who have invested heavily in the business community. The Resort Municipality, especially in times of large events or in establishing new businesses and residences has wanted to examine its transportation and connectivity issues. Indeed, it should examine all the public services it provides. The agricultural lands are significant cultural and heritage contributors to the economy and landscape of the community. There is a significant oyster farming operation in the Municipality. Although environmentally sensitive areas are protected by the presence of the PEI National Park, the rest of the area has never been studied for potential issues. From an economic development standpoint, PEI National Park owns the most important assets in the community yet relationships between it and the community can at times be challenging. These are but some of the issues that cannot be dealt with by bylaws alone. The Resort Municipality is looking for a much broader plan for the future.

This Strategic Plan can also influence the preparation of project ready initiatives for upcoming and future infrastructure projects funded by federal and provincial governments. Council can often identify needs for the community, but it is important to also engage the wider community who come with creative and innovative ideas and solutions.

## 2.2 Study Area

The study area includes all lands and people within the jurisdiction of the Resort Municipality.

Consideration will need to be given to the fact that a significant amount of land contained within the municipal boundaries are under the jurisdiction of the PEI National Park either as park land or crown land. Many policies, practices and initiatives can be affected by this fact.

## 2.3 Scope of Work

The development of the Municipality's Strategic Plan must identify and address the following factors:

1. The vision, priorities and concerns of the Municipal Council and Planning Board as identified through attendance and communication at Council and Planning Board meetings. Council and Planning Board meet monthly and the successful Proponent will be expected to attend at regular intervals.
2. The vision, priorities and concerns of area residents, as identified through a robust public consultation process. Proponents must consider whole community consultations (minimum 2), specific group consultations such as agriculture, tourism, etc. (minimum 4) and a minimum of 12 individual interviews. Citizens unable to attend community consultations should be given an opportunity to review any information presented and given the opportunity to provide input prior to formulating the final report. It is at the Proponent's discretion to propose the best desired method to ensure anyone interested in providing feedback, have that opportunity to do so.
3. The regional economic, physical, social and environmental influences that have affected the area since the Municipality's creation.
4. The regional economic, physical, social and environmental influences likely to affect the area over the 15-year planning horizon till 2034.
5. The effect of established as well as emerging non-residential and residential development trends in the area.
6. The impact of development trends and technology on infrastructure needs in the study area.
7. The impact of the new *Municipal Government Act* on the relationship and communication between Council and its population.

Proponents should look at how other municipalities and in particular resort municipalities address topics such as those that follow but not limited to:

- land compatibility and/or preservation issues,
- infrastructure needs,
- rural economic development,
- heritage and cultural resources,
- population engagement,
- policies around major events,

- residential population growth,
- the value in the identification and creation of a core area vs rural strip development

Proponents need to be familiar with the concepts of placemaking and steps to create a vibrant community. It is expected that recommendations will stem from the research and consultations conducted by the Proponent.

Proponents should propose specific goals, strategies and tactics for consideration by the Municipality in the strategic plan. These should be backed up by a scan or situation analysis taken from the research conducted by the Proponent.

The Strategic Plan should provide overall direction, match resources to opportunities, address resistance and barriers, and connect with citizens.

#### **2.4 Deliverables**

The successful proponent will be required to provide the following documents to the Resort Municipality upon completion of the tasks listed in the scope of work:

1. Eight copies plus a digital copy of the interim report.
2. Eight copies plus a digital copy of the final Resort Municipality Strategic Plan, including all associated mapping if appropriate (capable of communicating content when printed either in colour or grayscale formats).
3. One electronic PDF version of all final documents.
4. One electronic MS Word version of all final and draft documents.
5. One electronic PDF, JPEG or TIFF version of all final graphic content.
6. One electronic ArcMap or compatible format of all maps included in final documents.
7. One electronic copy of all presentation materials.

#### **2.5 Budget, Timing and Payment Schedule**

The budget estimated for this scope of work is expected to be in the range of \$32,000 to \$35,000. Proponents are asked to provide a payment schedule as per Section 3.8 but under no circumstance will the Municipality disburse more than 70% before final completion of the work.

Tentative schedule:

- Evaluation of proposals/interviews: week of May 13<sup>th</sup>, 2019
- Award of contract to successful proponent: week of May 28<sup>th</sup>, 2019
- Kick-off meeting and finalization of work plan: week of June 3<sup>rd</sup>, 2019
- Interim draft deliverable: First week of October 2019
- Final deliverables: First week of December 2019

## **2.6 Available Resources and Materials**

The following documentation is available for review:

- Previous and existing Official Plans
- Zoning and Subdivision Control (Development) Bylaw
- Existing bylaws
- Policy manual
- Maps
- Special Event guidelines
- Tourism Cavendish Beach Strategic Plan
- Central Coastal Tourism Partnership Strategic Plan

## **3. Instructions for Proponents**

### **3.1 Clarifications regarding this RFP**

Inquiries regarding this RFP shall be submitted by email to:

RFP Contact: Brenda MacDonald, CAO, Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico, 7591 Cawnpore Lane, R.R. # 2, Hunter River, PE, COA 1N0

E-mail: resortmunicipal@eastlink.ca.

The Resort Municipality is under no obligation to provide additional information regarding this RFP and will not be responsible for any information provided by or obtained from any source other than the RFP Contact. It is the responsibility of the proponent to seek clarification from the RFP Contact on any matter it considers to be unclear. The Resort Municipality will not be responsible for any misunderstanding on the part of the proponent concerning this RFP or its process.

### **3.2 New information regarding this RFP**

This RFP may be amended only by addendum in accordance with this section. If the Resort Municipality, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated by addendum on the PEI Government web site at <https://www.princeedwardisland.ca/en/tenders>

Each addendum will form an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by the Resort Municipality and will be deemed to have read all posted addenda. Changes communicated in any other manner shall not be binding upon the Resort Municipality. Proponents shall not rely upon changes communicated in any other manner. By submitting a proposal, a proponent is deemed to have received and understood the RFP, including any and all addenda.

### 3.3 Closing Date and Time for Proposals

Proposals will be accepted up to noon, Atlantic Standard Time, April 30, 2019. Proposals received after the closing time will not be considered. Proposals must be submitted at the location set out in Section 3.4 on or before the closing time and date. The proponent is solely responsible for the delivery of its proposal to the exact location indicated in this RFP on or before the closing date and time. The Resort Municipality does not accept any responsibility for proposals delivered to any other location by the proponent or its delivery agents. Proposals submitted after the closing date and time will be rejected. The Resort Municipality's time clock will be deemed to be correct.

### 3.4 Delivery Address for Proposals

Eight copies of the proponent's proposal along with a digital copy on a flash drive should be included in a sealed package, prominently marked with the completed submission label and delivered to the address below:

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

Proposals submitted by facsimile transfer or e-mail will not be accepted.

In the interest of environmental sustainability, please refrain from using binders, binding, plastic covers, or similar fastening or presentation materials when submitting a proposal. Similarly, proponents should not include product catalogues, or other marketing materials.

### 3.5 Submission Label

Proponents should label their submissions as follows:

Attention: Brenda MacDonald, CAO

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

RFP Title: Professional Services for a Strategic Plan

Full Legal Name of Proponent:

Return Address of Proponent:

### 3.6 Submission Format

Proposals should be submitted in the following format:

#### 1. Submission 1: Technical Proposal

Submission 1, in paper format, should be sealed, clearly labeled "Technical Proposal" and include the RFP number and name of the proponent. Eight



unbound copies of the information requested in Section 3.7 should be included in the technical proposal along with a digital copy on a flash drive.

## 2. Submission 2: Financial Proposal

Submission 2, in paper format, should be sealed, clearly labeled “Financial Proposal” and include the RFP number and name of the proponent. Eight unbound copies of the information requested in Section 3.8 should be included in the financial proposal along with a digital copy on a flash drive.

### 3.7 Content of Technical Proposal

The technical proposal should include the following information:

1. **Cover letter:** identifying the lead proponent if the proposal includes any sub-contractors, indicating that the proponent is not aware of a conflict of interest in preparing or submitting a proposal, and signed by a person authorized to represent the proponent;
2. **Understanding of the scope of work:** Proponents should describe what their understanding of the work while identifying any assumptions or limitations on the part of the proponent;
3. **Experience of proponent and team members:** including a corporate profile of the proponent, experience in similar projects, the credentials and qualifications of team members and a minimum of three project references for similar work (inclusive of project descriptions, timeframe, budget and email and contact information for the client);
4. **Team structure and composition:** identifying the project manager, a contingency plan in the absence of the project manager, and the roles of all proposed team members (inclusive of resumes); and
5. **Proposed approach and work plan:** including the benefits of the methods and strategies proposed to complete the scope of work, a preliminary work plan, schedule and deliverables inclusive of major tasks, project milestones/phases, and the level of effort of team members.

### 3.8 Content of Financial Proposal

The financial proposal should include the following information:

1. A total firm fixed fee to complete the scope of work before HST;
2. A detailed breakdown of the total firm fixed fee, by major tasks/milestones/phases, identifying all disbursements and applicable taxes;
3. A proposed payment schedule based on milestones/deliverables;
4. Per diem and hourly rates for all team members;
5. Identification of any anticipated additional expenses identified by the proponent; and
6. Identification of any rate reductions or discounts offered by the proponent.

## **4. Selection Process**

### **4.1 Evaluation Team**

Submissions will be evaluated by the members of Council of the Resort Municipality. During the evaluation process, the evaluation team may consult with the references provided by Proponents, as appropriate per its discretion.

### **4.2 Evaluation Criteria**

The evaluation team will determine each Proponent's ability to provide the best overall value to the Municipality. Evaluation will be based on the following weighted criteria:

1. Understanding of scope of work described in Section 2 (25%)
2. Approach and work plan to complete the scope of work (25%)
3. Qualifications and experience of team members (20%)
4. Experience of proponent in completion of similar projects within budget and on schedule (15%)
5. Financial proposal (15%)

Financial proposals will only be scored for proponents who score 60/85 or more in the technical proposal.

### **4.3 Interviews**

Proponents may be requested to attend an interview prior to the Council's final decision. Interviews may be requested in person or via telephone.

### **4.4 Notification of Results**

The Resort Municipality will notify the successful proponent of the award in writing, via email and over the telephone as soon as a decision has been reached. All other proponents will be advised, in writing, via email of the Municipality's decision within one week of the selection of a successful proponent.

### **4.5 Debriefing Process**

Proponents may request a debriefing after notification of the outcome of the RFP process. All requests must be in writing to the RFP contact identified in Section 3.

All requests for debriefing must be made within sixty (60) days of notification of the outcome of the RFP process. The intent of the debriefing information session is to aid the proponent in presenting a better proposal in subsequent opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the RFP process or its outcome.

## **5. General Information**

Being a Resort Municipality, it is expected that the public consultations will be done when a majority of the public is available while other consultations will depend on availability of groups or individuals. The timeline allows for Proponents to have an initial public consultation followed by a second consultation to verify recommendations further down the road.

## **6. Terms and Conditions**

### **6.1 Right of Cancellation and Rejection**

The final authority to award this project rests with the Council of the Resort Municipality. The Resort Municipality reserves the right to cancel this RFP at any time prior to entering into a contract with the successful proponent. The Resort Municipality reserves the right to reject any or all proposals, whether or not they contain all required information, without stating reasons. Proponents should note that the lowest cost proposal will not necessarily be awarded a contract.

### **6.2 Modification of Terms**

The Resort Municipality reserves the right to amend or supplement this RFP at any time at its sole discretion before the closing date, by issuing an addendum. The Resort Municipality may amend the closing date if an addendum is issued five business days before the closing date, to allow for consideration of the addendum by potential proponents. The Resort Municipality may request clarification of any proposal and may waive formalities where, in the opinion of the Resort Municipality, there is a minor irregularity or omission in the information submitted by a proponent. The final Terms of Reference that govern the contract between the Resort Municipality and the successful proponent are subject to adjustment by the Resort Municipality and the successful proponent.

### **6.3 Proponent Expenses**

Proponents are solely responsible for any and all expenses incurred in the preparation of proposals and subsequent negotiations with the Resort Municipality. The Resort Municipality will not be responsible for any liabilities, costs, expenses, loss or damage associated with or arising from the proposal preparation, interview and selection process and incurred by potential proponents.

### **6.4 Conditional Proposals**

Conditional proposals will not be accepted.

### **6.5 Negotiation Delay**

If a written contract cannot be negotiated within seven business days of notification of the highest-ranking proponent, the Resort Municipality may, at its sole discretion any time, thereafter, terminate negotiations with the proponent and either negotiate one or more contracts with the next qualified proponent or terminate the RFP process and not enter into a contract with any of the proponents.

### **6.6 Indemnity**

No proponent has legal rights or privileges for services rendered before a contract is signed with the Resort Municipality. Any contract resulting from this RFP is subject to the indemnity provisions in that contract.

### **6.7 Conflict of Interest**

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.

### **6.8 Sub-contracting**

While the proponent may engage sub-contractors for this project, the Resort Municipality will deal directly with the lead proponent identified in the cover letter to the technical proposal. The lead proponent will assume all responsibility and liability for the acts and omissions of the team. The lead proponent must have the authority to bind the members of the team to the contract negotiated with the Resort Municipality. Additional or replacement sub-contractors will not be permitted without the prior written consent of the Resort Municipality.

### **6.9 Compliance with Laws**

Any contract resulting from this RFP will be governed by, and will be construed and interpreted in accordance with, the laws of the Province of Prince Edward Island. The proponent is responsible for obtaining all necessary licenses and permits, and for complying with all applicable federal, provincial and municipal laws, codes and regulations in connection with submitting a proposal and providing contracted services. The proponent shall, when requested, provide the Resort Municipality with adequate evidence of its compliance with this section.

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)

**6.10 Period of Submission Validity**

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