

**The Township of Edwardsburgh Cardinal
Request for Proposal (RFP)
for a
Community Improvement Plan (CIP)**

Date of RFP Issue: September 16, 2024

Submissions must be received on or before:

November 25, 2024 at 4 p.m.

Proposals are to be submitted via email to:

Township of Edwardsburgh Cardinal

Sean Nicholson, CAO

snicholson@twpec.ca

1. Background and Project Summary

The Township of Edwardsburgh Cardinal is nestled in Eastern Ontario and boasts a population of approximately 7,000 residents. Situated along the picturesque St. Lawrence River Seaway to the south, the township encompasses Cardinal and Johnstown's industrious villages, Spencerville's historic village, which serves as the municipal government seat, and several rural hamlets. A vibrant community with a rich history and a diverse population, the Township is committed to fostering sustainable growth and enhancing the livability of its communities.

The development of a new Community Improvement Plan (CIP) for Edwardsburgh Cardinal aligns seamlessly with the township's newly received Strategic Plan, which delineates six strategic priority areas: Liveable Community, Good Governance, Financial Sustainability, Infrastructure, Growth and Economic Development, and Environment. The CIP will embody these previously identified priorities by setting specific objectives and actions that reflect the community's commitment to fostering economic advancement, environmental responsibility, and efficient governance. This alignment will ensure a holistic and strategic approach to community development, fostering a thriving, sustainable future for all residents of Edwardsburgh Cardinal.

The new Community Improvement Plan will consider the Township's Housing Needs Assessment completed in 2023 and encourage housing development that will support the growing workforce of our local businesses. The plan will support the development of housing that is affordable and attainable for residents of Edwardsburgh Cardinal.

The new Community Improvement Plan will also aim to enhance commercial and mixed-use buildings within the business districts of Edwardsburgh Cardinal, fostering property improvements that will stimulate local growth and revitalize key areas of the community.

It is intended that the new Community Improvement Plan will offer financial incentives that align with these goals.

2. Definitions

Township: Refers to the Township of Edwardsburgh Cardinal

Respondent: Refers to any eligible entity providing a Proposal

Successful Respondent: Refers, in the event of an award, to the selected Respondent

Consultant: Refers, in the event of an award, to the selected Respondent

RFP: Refers to Request for Proposal

3. Project Objectives and Focus

The selected Consultant will work with Township staff to undertake the development of a Community Improvement Plan for the Township of Edwardsburgh Cardinal. The plan shall be customized to the Township's investment attraction and housing needs.

4. Scope and Constraints

The selected Consultant is required to ensure that the process maintains or improves upon several key attributes as described below:

1. The CIP must be developed in such a way as to achieve maximum participation from the community.
2. The process must meet or exceed the statutory requirements of Section 28 of the Planning Act.
3. Respondents are encouraged to recommend the most effective and efficient method of engaging stakeholders in the process of the CIP. It is hoped that the Proponent will be able to expedite the project, while at the same time providing an opportunity for meaningful public input.
4. Respondents are encouraged to consider best practices from other municipalities in the use of CIPs that reflect on affordable/attainable housing, in formulating their recommendations.
5. Respondents will be required to consider the Township's financial capabilities in their recommendations. This will include cost-benefit discussions as well as a projection of annual budget allocations required to support the recommended CIP.

5. Deliverables

The Consultant will be responsible for providing expert advice throughout the project and for the following deliverables (note that Proponents are not limited by the deliverables and may wish to expand on them):

1. Project Coordination – including regular meetings and status reports to keep the project on schedule
2. Orientation of Participants – to the process, the components of planning, and background technical information.
3. Stakeholder Input – defining a consultation strategy that provides updates to the draft plan for Council; and gathering stakeholder information and input for incorporation into a final draft.
4. Needs Assessment and Environmental Scan – reviewing background information pertinent to the development of the CIP, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities, and threats.
5. Meeting Facilitation – leading the facilitating discussion; ensuring that conversations are forward-thinking; and action-oriented and move the participants towards creating a shared future with established and clear priorities.

6. Plan Documentation – including creation of a final plan document and executive summary and implementation plan for public review and presentation. The Consultant will be expected to support the presentation of the final document to Council.
7. The Consultant will be required to provide electronic copies of all drafts and final reports and material used for presentations to Council in Microsoft Office and PDF files through any agreed-upon electronic transfer. Final documents must be accessible, with appropriate fonts, headings, and image labels as per Ontario AODA standards.

6. Timing of Project

Activity	Projected Date
Request for Proposals Issued	September 16, 2024
Deadlines for Questions	September 30, 2024 (2 weeks)
Response to Questions	October 14, 2024 (2 weeks)
Proposal Due to the Township	November 25, 2024 (6 weeks)
Selection of Successful Bidder	December 16, 2024 (3 weeks)
Project Begins	Early Q1 2025
Final Plan & Report to Council	Early Q2 2025
Project Completion	July 2025

7. Proposal Content and Submission Format

1. All proposals must be submitted electronically in PDF format to snicholson@twpec.ca
2. It is essential that the document format adheres directly to the same numbering, sequence and topics as those listed following. This will enable the evaluation committee to perform a more effective review of submissions. Failure to do so may eliminate the Proposal from further consideration.
3. The Respondent's proposal should be as concise as reasonably possible, and include, at a minimum, a response to each of the following items:

Section 1 Company Overview

Identify the prime firm submitting the proposal. Identify any other firms that may be involved (sub-contracted) on your behalf and their legal/contractual relationship with the prime firm along with the expertise and respective projected costs of their involvement.

Respondents are to include any additional information regarding their firm and/or services that could prove beneficial to the evaluation team in accessing their submission in appendices.

Section 2 Project Manager & Support Staff

Include the Project Manager and Support Staff that would be directly involved in the project, indicating experience, credentials and notable achievements in the area of this work assignment.

Section 3 Experience on Similar Projects

Respondents shall include at least two (2) references that outline previous community strategic planning for projects of a similar magnitude that have been successfully completed by their firm in the past five (5) years. This shall include the client names, contacts and contact phone numbers. The Township reserves the right to contact these references, where appropriate.

Section 4 Project Understanding and Work Plan

Respondents are to confirm their understanding of the Scope of Work and clearly define how they would go about to achieve same, noting the sequence and timing of all project phases.

Respondents are required to include in their response, if any Addenda to the RFP was received (if applicable).

Section 5 Schedule of Work

Respondents shall indicate when work would be commenced and, the approximate timeframe required to complete the assignment. Meeting dates, other key events, and major project deliverables should be clearly identified on the project schedule.

Section 6 Financial

Provide a detailed accounting of the costs associated with the project. Prices quoted in the Proposal shall include excise tax, patent, import duty, foreign exchange, and all other charges. HST must be shown as a separate item.

Section 7 Community Engagement

Outline your approach to community engagement, including:

- Stakeholder Identification: How you will identify and involve key stakeholders (residents, businesses, etc.).
- Engagement Strategy: Methods for gathering public input (surveys, meetings, etc.).
- Schedule: Proposed timeline for public consultation events.
- Feedback Incorporation: How feedback will be collected, analyzed, and integrated into the CIP, with regular updates to stakeholders

4. Respondents are required to include in their response, the Respondent's Declaration as shown in Appendix "A" to this RFP.

8. Evaluation Methodology

Proposals will be reviewed in detail and scored by the Township evaluation committee on a consensus basis. The team reserves the right to clarify any issues during the entire evaluation process. The evaluation committee intends to recommend the appointment of the Proponent on the basis of most qualified personnel and "best overall value" to the Municipal Council.

The contents of the proposals should address the evaluation criteria outlined below and will be scored in relation to the points that are stipulated.

1. Understanding of the Project (20%)

Project Understanding (10%): How well the proposal demonstrates an understanding of the objectives, challenges, and needs specific to the community.

Approach and Methodology (10%): The appropriateness and effectiveness of the proposed approach to developing the CIP, including public engagement strategies and the means in which the Consultant plans to address key issues.

2. Experience and Qualifications (25%)

Relevant Experience (15%): The firm's experience in preparing CIPs or similar planning documents, particularly in comparable communities.

Team Qualifications (10%): The qualifications and expertise of the team members who will be directly involved in the project, including their experience in community planning, urban design, and economic development.

3. Work Plan and Schedule (20%)

Detailed Work Plan (15%): The clarity, detail, and feasibility of the work plan, including key tasks, deliverables, and timelines.

Adherence to Schedule (5%): The ability to meet the project's deadlines and any strategies proposed to ensure timely completion.

4. Community Engagement (15%)

Public Consultation Approach (10%): The proposed strategy for engaging with stakeholders, including residents, business owners, and other community members.

Innovative Engagement Techniques (5%): The use of innovative or effective techniques to ensure broad and meaningful community participation.

5. Cost Proposal (15%)

Budget Realism and Value (10%): The reasonableness of the cost proposal in relation to the scope of work, and the overall value provided.

Transparency of Costs (5%): The clarity and detail provided in the cost breakdown, including any contingencies.

6. References and Past Performance (5%)

Client References (5%): Feedback from previous clients, particularly those for whom the firm has completed similar projects, with a focus on the quality of work, adherence to timelines, and overall satisfaction.

This breakout ensures that the scoring process is comprehensive, fair, and focuses on the critical aspects necessary for the successful development of a Community Improvement Plan.

9. Selection Process

The evaluation committee will review the Proposals and rank them based on the evaluation criteria outlined in Section 8. The Township reserves the right to consider other criteria that may become evident during the evaluation process to obtain best value.

10. Negotiation

The Township reserves the right, before contract award, to negotiate changes to the scope of the services (including pricing to meet the budget) with the Proponent or any one or more Proponents, proposing the “best value” without having any duty to advise any other Proponent or to allow them to vary their proposal as a result of changes to the scope of the services or to the contract documents; and the Township may enter into a changed or different contract with the Proponent(s) proposing the “best value”, without liability to Proponents who are not awarded the contract.

11. General Terms and Conditions

1. Not a Tender

This RFP is not intended to create a contractual relationship between the Township and the Proponent. By issue of this RFP document, the Township intends to reserve itself to absolute and unfettered discretion to invite, consider and analyze Proposals, select preferred Proponent(s), and negotiate with or accept a Proposal to the preferred Proponent(s) or cancel this RFP process as the Township considers desirable.

2. Late Submissions

Proposals received after the official closing will not be considered during the selection process and will be returned to the respective Respondent.

3. Addenda

Proponents are required to check the Township’s website before the closing date for any updated information and addenda issued.

4. Proposal Opening

Respondents are advised there will not be a public opening for this RFP. Submissions received by the date and time of closing will be opened administratively by respective members of the Township at a time subsequent to the closing.

5. Errors and Omissions

The Proponent has the responsibility to notify the Township of Edwardsburgh Cardinal, in writing, of any ambiguity, divergence, error, omission, oversight, or contradiction contained in the RFP as it is discovered and to request any instructions, decisions, or discretion which may be required in preparing the Submission, before the closing of this RFP.

6. Proponent Expenses

The Township will not be responsible for any costs incurred by the Proponents in the preparation of a Proposal and for any time expended in any subsequent negotiations and demonstrations.

It is the Respondent's ultimate responsibility to ensure all addenda have been received.

Respondents shall be required to acknowledge receipt of the addenda in their submission.

7. Rejection Rights

The Township of Edwardsburgh Cardinal reserves the right to reject any or all Submissions. Any Submissions not containing sufficient information, in the view of the Township of Edwardsburgh Cardinal, or its designated agent(s), to permit a thorough analysis may be rejected. The lowest cost proposal will not necessarily be accepted. The Township reserves the right to retain all proposals submitted and to use any ideas contained in a proposal regardless of whether that proposal is selected.

The Township of Edwardsburgh Cardinal reserves the right to verify the validity of the information supplied, and to reject any Submission where the contents appear to be incorrect, or inaccurate in the estimation of the Township of Edwardsburgh Cardinal, or its designated agent(s).

Submissions not conforming to the requirements of the RFP may not be considered, at the sole discretion of the Township. Responses which are unsupported by the information requested in the RFP document, or not complying therewith, may not be considered. Revisions received orally, by telephone, facsimile or other means, after the specified closing time and date may not be accepted or considered.

8. No Claim

No Proponent shall have any claim for any compensation of any kind whatsoever, as a result of submitting a response to this RFP, including accepting a non-compliant bid, and by submitting their company's information, each Proponent agrees that it has no claim.

9. Notification of Outcome

Following the award of this contract, the Proponents will be notified in writing/email.

10. Agreement

The successful Proponent must fulfill all obligations of the contents of their Submission and this RFP Document. The Township of Edwardsburgh Cardinal reserves the right to negotiate details of the Agreement and to make the necessary changes or substitution within the general scope of the contract.

11. Solicitation of Council Members and Staff

Proponents will not contact any member of the Township Council or staff with respect to this RFP, at any time prior to the award of a contract or the termination of this RFP. Township may reject the Proposal of any Proponent that makes any such contact.

12. Conflict of Interest

Proponents must disclose in their Proposal any potential conflicts of interest and existing business relationships they may have with the Township.

13. Subcontracts and Brokering

Subcontracts for components of this contract must be fully disclosed and meet all the same requirements as the lead contractor. All subcontracts must receive the approval of the Township of Edwardsburgh Cardinal prior to services being rendered. Only Submissions received directly and/or through an approved representative of the named Proponent will be accepted. Submissions received by Brokers representing one or more Proponents shall not be accepted and will be disqualified

14. Indemnity

The Proponent shall defend, indemnify, and hold harmless the Township of Edwardsburgh Cardinal, all of its officers, agents and employees from, and against all claims, actions, suits, demands, proceedings costs, damages and liabilities, arising out of, connected with, or resulting from any negligent acts or omissions of the Proponent or any agent, employee, subcontractor, or supplier of contractor in the execution or performance of the resulting contract.

15. Insurance

Proponent shall have in place a General Liability policy in the minimum amount of \$5,000,000 and Professional Errors and Omissions Insurance with a minimum coverage

of \$1,000,000. Certificates of insurance are required from the successful Proponent prior to award of the assignment.

16. WSIB Coverage

The Proponent warrants that they are not in financial arrears with the Workplace Safety & Insurance Board and that all of their employees are fully covered under the terms of the Act and will provide the Township with a current Certificate of Coverage during any time in the execution or performance of the resulting contract.

17. Compliance with Laws

The Proponent shall comply with all applicable laws relating to the RFP, the Submission and any contract resulting there from.

18. Accessibility Standard Compliance

The Accessibility for Ontarians with Disabilities Act, 2005 (AODA), Accessibility Standard for Customer Service (ASCS) and the Integrated Accessibility Standards Regulation (IASR) require all contractors and their employees who provide goods, services or facilities on behalf of the Township of Edwardsburgh Cardinal receive training on these standards and on the Human Rights Code as they pertain to persons with disabilities. Contractors must keep records of all training, including dates when training was provided, the number of employees who received training and individual training records for their business. Contractors are required to make this information available to the Township and/or the Province upon request.

19. Confidentiality

The Proponent shall not at any time before, during or after the completion of the contract, divulge to any third parties confidential Township information, which they obtain during the course of the contract.

All requirements and information obtained by a Proponent in connection with the RFP are the property of the Township of Edwardsburgh Cardinal and must be treated as confidential and not used for any purpose other than for replying to this RFP and for the fulfillment of any contract.

All documentation which a Proponent delivers to the Township of Edwardsburgh Cardinal or its designated agent(s) for the purposes of this RFP, becomes the property of the Township of Edwardsburgh Cardinal and is subject to the terms of the Municipal Freedom of Information and Protection of Privacy Act.

If a Proponent believes any part of its Submission reveals any trade secret of the Proponent, any intellectual property right of the Proponent, scientific, technical, commercial, financial or labour relations information belonging to the Proponent, and if the Proponent wishes the Township of Edwardsburgh Cardinal to attempt to preserve the confidentiality of the trade secret, intellectual property rights or information, then these matters must be clearly identified and designated as confidential.

The Proponents are informed that certain information respecting the privacy of individuals and proprietary information regarding the security of municipal operations cannot and will not be released to anyone other than the Proponent that has been engaged.

All requests for access to the submitted RFPs will be subject to a formal review pursuant to section 10(1) of the Municipal Freedom of Information and Protection of Privacy Act, and representation will be sought prior to disclosure of any third-party information.

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APPENDIX A

THIS PAGE MUST BE RETURNED AS PART OF THE PROPOSAL SUBMISSION

RESPONDENT'S DECLARATION

The Respondent has carefully examined the conditions attached to this Request for Proposal and is prepared to perform the work as outlined in this document in an expedient, professional, and workmanlike manner, promptly and as directed by the Township.

This proposal is made without any connection, comparison of figures, or arrangements with, or knowledge of any other corporation, firm or person making a proposal for the same service and is in all respect fair and without collusion or fraud.

The content and requirements of this RFP have been read and understood.

All prices are quoted in Canadian funds.

DATED AT _____ THIS _____ DAY OF _____ 2024

SIGNATURE OF WITNESS

SIGNATURE OF RESPONDENT