



The CORPORATION OF THE MUNICIPALITY OF ARRAN-ELDERSLIE
1925 Bruce Road #10 Chesley, ON N0G1L0
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REQUEST FOR PROPOSALS FOR THE MUNICIPALITY OF ARRAN-ELDERSLIE

CORPORATE STRATEGIC PLAN

The Municipality invites your company to provide a proposal to supply:
Consulting Services for the development of a Strategic Plan

Date Issued: November 23, 2021

Deadline: December 17, 2021

Proposals must be clearly marked Consulting Services for a Strategic Plan and be delivered by way of hand delivered, courier mail, or email to:

Sylvia Kirkwood, CAO

Municipality of Arran-Elderslie

1925 Bruce Road 10

Chesley, ON N0G 1L0

cao@arran-elderslie.ca

The Municipality assumes no risk or responsibility whatsoever that any fax or email will be received as required herein and shall not be liable to any bidder if for any reason an electronic bid is not properly received. Questions regarding this Request for Proposal can be emailed to the contact above.

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General Description of Project

The Municipality of Arran-Elderslie is issuing the Request for Proposal (“RFP”) to identify qualified consulting firms for the preparation of a Corporate Strategy. The Municipality seeks a firm that has experience in the systematic approach to the preparation and implementation of Municipal Strategic Plan for a rural based Municipality. It is expected that the selected firm will prepare a Strategy that contains corporate goals, strategies, implementation actions and performance measures.

The purpose of this RFP is to solicit responses from consulting firms wishing to be considered for this project to enhance the Municipality by ensuring the long term goals, direction and vision are identified and implementation tools have been developed to ensure long term success and community well-being

Background

The Corporation of the Municipality of Arran-Elderslie is home to approximately 6,800 residents who enjoy the natural landscape and rural life. The Municipality of Arran-Elderslie was created January 1, 1999 with the amalgamation of the Townships of Arran and Elderslie, including the Town of Chesley and the Villages of Paisley and Tara. The Municipality is governed by 7 members of Council: which include 5 Ward Councillors as well as a Deputy Mayor and Mayor.

Residents and the business community have found that Arran-Elderslie is a great place to live due to its proximity to major employers such as Bruce Power and its supplier companies, as well as larger businesses in the City of Owen Sound. Sectors within Arran-Elderslie includes, but not limited to the following sectors; *listed in no particular order*

- Small business
- Tourism
- Service industry
- Agricultural
- Home based business
- Manufacturing
- Health services

Arran-Elderslie is known as a welcoming community that many find the perfect place to buy their first home, raise a family, own a business or retire to. The Municipality is home to residents of all ages. There is a large Mennonite and Amish population in the rural area. One of the communities within the municipality is the Village of Paisley. Paisley attracts tourists in the summer months, as the major tourist route to vacation and cottage destinations,

County Road #3, is directed through downtown Paisley. As well, the Saugeen River flows through Paisley attracting visitors for canoeing or fishing. Businesses within Paisley focus on service, retail and tourism, with an increased focus on artesian and arts-based culture, as the community was branded the 'Artistic River Village' in 2018.

The Town of Chesley and the Village of Tara are primarily agricultural communities with service and retail businesses within the communities. Housing developments in Chesley and Tara over the past 5 years have contributed to community growth.

The Municipal Office is located in Chesley. The Municipality employs approx. 50 full time staff, 25 seasonal staff and 75 volunteer fire fighters. Municipal departments are listed below:

- Public Works
- Facilities, Parks and Recreation
- CAO/Clerks
- Building
- Economic Development
- Treasury

The Municipality of Arran-Elderslie has made significant progress over the past several years with multiple departmental strategies developed and approved including a Corporate Workplan, Recreation Master Plan, Economic Development Strategic Plan, Fire Master Plan, Roads Needs Study and Asset Management Plan. In the past number of years, the Corporate website has also been updated and a number of processes have come into place to better serve residents as well as increase staff efficiency.

The Corporate Strategic Plan developed in 2022 will be able to build upon these documents to develop an overall vision statement and a set of goals and direction for the first plan of it's type for the Municipality of Arran-Elderslie.

Consultant Requirements

Minimum requirements by the consultant for submission of a proposal in response to the RFP include the following:

- a. Demonstrated understanding of policies, procedures and operations of rural Municipal organizations of similar size.
- b. Demonstrated experience, competence, and qualifications of the consultant and the participating staff successfully providing similar services to public entities (three references will also be required).
- c. Understanding of the requested services and appropriateness of the proposed work program.
- d. Ability to perform the work in a timely manner, availability of staff (if included) and contingency plans and is to include a work schedule.
- e. Proposals must state the proposer's related business information.

Proposed Project Schedule

RFP Issued	November 23, 2021
Deadline for Proposed Submission	December 17, 2021 12:00pm
Opening of Proposals	December 17, 2021 12:30pm
Recommendation to Council	January 10, 2022
Final Delivery of Strategy	April 25, 2022

Scope of Services

The overall responsibility and scope of work for the consultant is to prepare an actionable and measurable Corporate mid to longer term (5 to 10 year) strategy containing goals, objectives, and implementation actions. The consultant will also provide facilitation services during the public outreach and stakeholder engagement process. The consultant, with support from staff, Council and stakeholders, shall provide professional services to support the following tasks:

1. Review and analyze existing relevant by-laws reports, policies and studies that may influence goals and objectives in the Strategic Plan.
2. Complete stakeholder engagement and consultation in developing the strategy. The engagement and consultation process may incorporate various techniques, but shall include:
 - One initial start-up meeting with CAO and Department Heads to gain input and further direction on the scope of work to be done
 - Consultation session with Council members
 - Consultation sessions with community members (Consultants to provide recommendation on number and types of community sessions)
3. Identify the Municipality's assets and competitive advantages to incorporate these assets and advantages into an overall Strategy. This task should include a Strengths, Weaknesses, Opportunities and Threats (SWOT) or SWOT-style analysis of the Municipality and the surrounding area.
4. Review and analyze local by-laws, policies, processes and regulations providing

recommendations on making adjustments, where necessary and appropriate, to support sustainable economic growth and diversification.

5. Conduct a review of the current status of the municipal organization, including existing plans, policies and long-term goals; the prevailing labour climate; the Municipality's financial status, and other relevant, related research deemed necessary.
6. Prepare a draft Strategic Plan based on the information gathered at all meetings/stakeholder sessions for Council review and approval.

The Strategic Plan should include, as a very minimum, the following:

- The Municipality of Arran-Elderslie's Mission, Strategic Vision and related goals
- Key values and guiding principles to assist direction and decision making
- Implementation Plan, outlining a prioritization of short-term and long-term recommended Implementation Actions to achieve strategic vision and goals

Supplementary information should include:

- List of strategic issues relevant to Arran-Elderslie
- Performance measurement tools during the implementation phase
- Communications and Marketing Plan goals
- Any other relevant information

The Consultant will submit fifteen (15) bound copies of the final Corporate Strategic Plan and an electronic version in Microsoft Word format by or before January, 2021 along with all invoices. In addition, an executive summary and PowerPoint Presentation of the final report in electronic version will also be submitted.

Work Schedule

The consultant's work schedule will begin immediately upon award of contract and is expected to continue until Council approves the acceptance of a complete plan. A proposed work schedule for the strategy process must be submitted as part of the proposal to ensure completeness of the process and all invoices to be submitted by April 29, 2022.

Budget

The budget for this project is \$35,000 including HST.

RFP Proposal Submission Requirements

Consultants interested in providing these services must prepare and submit a Proposal that includes:

a. Cover Letter

The cover letter is to be signed by an officer of the company authorized to execute a contract with the Municipality.

b. Consultant Qualifications

This section shall describe the areas of expertise of current permanent staff whether a sole proprietor or individuals on a team and the scope of services that can be provided by the firm without the services of contractors under the consultant's direction.

c. Key Personnel

Include a proposed project management structure. Identify the key contact for the project and all personnel, if applicable, who will be assigned to work on this project, including a description of their abilities, qualifications and experience. Include resumes for all key individuals. There can be no change of key personnel once the proposal is submitted without the prior written approval of the Municipality.

d. Subcontractors

Identify any portion of the scope of work that will be subcontracted. Include firm qualifications and key personnel, telephone number and contact person for all subcontractors. The Municipality reserves the right to approve or reject all consultants or internal staff performing consulting services, proposed by the consultant during or after the consultant review and selection process.

e. Project Work Plan

A description of project understanding, detailed work approach and methodology will be identified. The work plan should list specific tasks and any specific considerations, options or alternatives.

f. Project Schedule

Propose a timeline for completion for the strategy including start date, milestones and target date of completion. Any assumptions regarding turnaround time for Municipal Council or staff review should be clearly noted.

g. Budget

Provide a detailed fee proposal by task for the services identified in the Scope of Services Section of this proposal. Identify sub-tasks and the respective cost in your fee proposal, as necessary. This section of your proposal shall include a professional fee schedule (hourly fee chart) for the consultant (and if applicable the consultant's personnel) and the subcontractor's key personnel identified above who would be working on this project.

Hourly fees for additional or optional services that may be required shall also be included. Unless specified in the submission, the professional fee schedule shall include any costs associated with complying with the Municipality's insurance requirements. Identify the fee that will be charged for additional public or Municipal Council meetings not identified in the scope of services provided here.

h. References

A list of projects completed by the proposer under which services similar to those required by this RFP were performed shall be listed in your proposal. An emphasis should be placed on projects undertaken within the last five (5) years and if those projects undertaken for public agencies were located in similar sized communities. Include a brief description of the services, dates the services were provided and name and telephone number or references familiar with the services provided.

i. Work Samples

Provide brief descriptions of two projects dealing with strategic plans, master plans or similar topics prepared by or under the direction of your firm. Include in your description the techniques used in the planning process and the outcome(s).

j. Deadline and Delivery

Three (3) bound copies of the proposal on 8 ½ inches x 11 inches paper printed on both

sides of the pages and an electronic PDF version of the proposal shall be submitted to the Municipality of Arran-Elderslie, the deadline for the submission of a Proposal is December 17, 2021 at noon EST. No information submitted or electronic mail will be accepted unless otherwise requested by the Municipality during the proposal review process. Proposals received after 12noon EST on December 17, 2021 will not be accepted.

Document must meet Accessible Requirements in accordance with Provincial Requirements.

Review and Evaluation Process

Consultant selection will be based upon a qualitative review of the proposals submitted. Municipal staff may request additional clarifying information from any or all consultants that submit a proposal during the review process. Municipal staff members will evaluate the responses to this RFP and may interview the top-rated consultants or all consultants. Following the interview, a recommendation will be made to Municipal Council on the selection of the consultant determined to be the most qualified for the project.

An evaluation by a staff committee will review and score the written proposals. Proposals will be evaluated on the basis of the following criteria:

1. Experience and Qualifications (30 %)
 - a. Understanding of Work
 - b. Planning and Project Management
 - c. Resumes
 - d. Competitive Advantage
 - e. References

2. Workplan and Timelines (40%)
 - a. Understanding of the Municipality of Arran-Elderslie's requirements and goals.
 - b. Quality of the Consultant's Strategic Planning Approach
 - c. Proposed Frameworks and Methodologies
 - d. Type of Community Consultation Activities and Events
 - e. Timeline and Duration
 - f. Implementation Plan

3. Budget (30%)

- a. Best Value Offered
- b. Detailed budget breakdown

Accept or Reject Proposal

The Municipality reserves the right to accept or reject any or all proposals and recommendations and may waive minor errors or omissions in any proposal. The Municipality reserves the right to select a consultant, who in the Committee's opinion, and upon Council's approval, provides the most advantageous solution and demonstrates their ability to provide the expected outcomes of the proposals that will best serve the interests of the Municipality. Arran-Elderslie is not obligated to award the contract based on the lowest price or any other particular factor. The Municipality will not be liable or reimburse any firm for the costs they incur to prepare their proposals. The Municipality also reserves the right to substitute components where the Municipality considers that an alternative may be more suitable and the right to modify any and all requirements stated in the RFP at any time prior to the possible awarding of the contract.

Ownership of Intellectual Materials

All data collected and all resulting reports and publications prepared by the successful firm will be the exclusive property of the Municipality of Arran-Elderslie who reserves ownership rights to all ideas and concepts developed.

Termination of Contract

Either the consultant or Municipality may terminate the contract, once awarded, at any time upon giving notice in writing at least (30) thirty days prior to the date of termination without penalty or recourse. In the event of such termination, the Consultant will be paid for services up to and including the date of termination.

Indemnification, Hold Harmless and Insurance Requirements

In addition to other standard contractual terms, the Municipality will require the selected vendor to comply with indemnification, hold harmless and insurance requirements as outlined below:

Consultant shall indemnify and hold the Municipality, its officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including solicitor's fees, arising out of or resulting from the acts, errors, or omissions of the consultant in performance of this contract, except for injuries and damages caused by the sole negligence of the Municipality.

The vendor shall procure and maintain, for the duration of this contract, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his/her agents, representatives, employees or subcontractors. The cost of such insurance shall be paid by the contractor. Insurance shall meet or exceed the following unless otherwise approved by the Municipality:

Insurance Requirements

1. Worker's Compensation coverage as required by the Province of Ontario.
2. Comprehensive or Commercial General Liability: \$2,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage.
3. Automobile Liability: \$2,000,000 combined single limit per accident for bodily injury and property damage.

Equal Opportunity

The Municipality is an equal opportunity employer and requires all proposers to comply with policies and regulations concerning equal opportunity. The proposer, in the performance of this contract, agrees not to discriminate in its employment due to an employee's or applicant's race, religion, national origin, ancestry, gender, sexual preference, age, physical handicap or any other characteristic protected by law.

Accessibility

The Municipality is committed to and working toward ensuring municipal services are accessible to all. We strive to meet or exceed the standards set by the *Accessibility for Ontarians with Disabilities Act* ("AODA") which are rules established by the Province to help businesses and organizations identify, remove and prevent barriers to accessibility. The AODA requires accessibility of goods, services, facilities, accommodations, employment as well as information and communication.

