



THE CORPORATION OF THE MUNICIPALITY OF WEST GREY

REQUEST FOR PROPOSAL

CONSULTING SERVICES

DEVELOPING A CORPORATE STRATEGIC PLAN

Proposals will be received prior to 2:00pm on Friday May 29, 2015.

*All inquiries related to this Request for Proposal shall be forwarded via email, to
ladams@westgrey.com*

(Please Note: Proposals submitted by facsimile or email will not be accepted)

MUNICIPALITY OF WEST GREY
REQUEST FOR PROPOSAL
CONSULTING SERVICES
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PART A – INSTRUCTIONS TO PROPONENTS

1.0 Introduction

The Municipality of West Grey is requesting responses to the RFP for the provision of consulting services from consultants or consulting firms with municipal corporate strategic planning expertise to assist the Municipality in developing a corporate strategic plan.

The proponent shall submit six (6) copies of its Proposal in a sealed envelope or package, clearly marked "Request for Proposal - Consulting Services - Developing a Corporate Strategic Plan". The Municipality reserves the right to make additional copies for internal use as required.

Proposals must be received no later than **2:00 pm on Friday May 29th, 2015**, by the Chief Administrative Officer/Deputy Clerk, Larry C. Adams, c/o the Municipality of West Grey, 402813 Grey Rd. #4, RR #2, Durham, Ontario, N0G 1R0.

2.0 Receipt and Acceptance of Proposal

- 2.1 The proposal, with all accompanying schedules, appendices or addenda will be received up to the closing time indicated in Part A, Section 1.0 of this RFP.
- 2.2 Proposals received after the Closing Date and/or Time or in locations other than the address indicated, will not be accepted and will be returned unopened. The Municipality of West Grey reserves the right, at its sole discretion, to extend the closing date and time.
- 2.3 All Proposals shall be open for acceptance for sixty (60) days after the Closing Time, whether or not another Proposal has been accepted.
- 2.4 If alternative Proposals are offered, the Proposals shall be submitted separately in the same format as the initial Proposal. While the Municipality of West Grey is not obligated to accept any alternatives, all suggested alternatives will be considered during the evaluation process.
- 2.5 Amendments to a Proposal may be submitted if delivered in writing prior to the Closing Time. In addition, Proposals may be withdrawn providing a written and signed notice has been received prior to the Closing Time.
- 2.6 Any deviations from the requirements or conditions specified in this RFP must be clearly stated in the proponent's Proposal. The Municipality of West Grey will be the sole judge as to what constitutes an acceptable deviation. If no deviations are indicated in the proponent's Proposal, the Municipality of West Grey expects the proponent to be in full compliance of the requirements and conditions stated herein.
- 2.7 If any of the terms set out in the RFP are unacceptable to the proponent, the proponent must identify such terms and provide suggested alternatives in its Proposal. Suggested alternatives will be considered during the evaluation process.
- 2.8 The Municipality of West Grey is not obligated to pay any costs the proponent incurs in the preparation of their Proposal.

3.0 Unacceptable Proposals

- 3.1 Proponents are notified that the lowest or any Proposal need not be accepted and the Municipality of West Grey reserves the right to reject or accept any or all Proposals in whole or in part at any time without further explanation.
- 3.2 Proponents are cautioned to carefully read and follow the instructions stated herein as the Municipality of West Grey reserves the right to disqualify any Proposal that fails to meet any of the requirements of this RFP.

4.0 Inquiries and Clarifications

- 4.1 It is the responsibility of the proponent to thoroughly examine these documents and satisfy itself as to the full requirements of this RFP. Inquiries are to be in written form only and emailed to the contact person indicated. If required, an addendum will be issued to all proponents.

5.0 Evaluation Process

- 5.1 All submissions shall become the property of the Municipality of West Grey. West Grey reserves the right neither to select any proposal nor to be bound to select the lowest priced proposal. Selection will be made based upon the following criteria, which will include but not be limited to:
- Completeness and thoroughness of proposal submitted in response to this RFP;
 - Background in corporate planning and demonstrated ability and experience to provide quality work and appropriate recommendations;
 - Expertise and relevant experience of assigned personnel;
 - Suitability and practicality of the overall methodology;
 - Experience in working with local governments in Ontario;
 - Ability to deliver within the time frame;
 - Project costs, schedule and commitment to the project.

Once the RFP period is closed, West Grey will evaluate the proposals and upon final selection, the Consultant will be expected to commence work within the time period formally agreed to.

West Grey is under no obligation to proceed with the RFP. Should it decide to abandon the Proposal, it may, at any time, invite further expressions of interest for the provision of consultant services to complete this Project.

- 5.2 Proponents may be required to provide additional information prior to the award of a contract and will be requested to attend an evaluation interview, pending a Proposal short listing process.
- 5.3 The Municipality of West Grey reserves the right, at its sole discretion, to enter into negotiations with the proponent or with any other proponents concurrently. In no event will the Municipality of West Grey be required to offer any modified terms to any proponent prior to entering into a contract, and the Municipality of West Grey will not be liable to any Proponent as a result of such negotiations.

6.0 Award

- 6.1 The Municipality of West Grey is not under any obligation to award a contract and reserves the right at its sole discretion to terminate or amend this RFP at any time.
- 6.2 The successful proponent (the "Consultant") is required to have a valid business licence.

7.0 The Contract

- 7.1 Any pricing changes, addition or deletion of items, and/or changes in service for any extension period will be negotiated between the Consultant and the Municipality of West Grey.
- 7.2 The Consultant's Proposal documents, the RFP and other documents, such as amendments or addenda agreed between the parties, comprise the "Contract Documents" and shall form the contract entered into between the Consultant and the Municipality of West Grey.

8.0 Freedom of Information and Protection of Privacy Act

- 8.1 The Municipality of West Grey is subject to Ontario's Municipal Freedom of Information and Protection of Privacy Act. All documents will be received and held in confidence by the Municipality of West Grey and the information will not be disclosed, except to the extent necessary for carrying out the West Grey's purposes or as required by law.

9.0 Confidentiality

- 9.1 Information about the Municipality of West Grey obtained by a proponent must not be disclosed unless authorized by West Grey. By submitting a Proposal, the proponent agrees that this obligation of confidentiality will survive the termination of this RFP and any contract that might arise between the parties.

PART B – GENERAL CONDITIONS

1.0 Ordering and Invoicing

- 1.1 The settling of accounts is to be directly between the Consultant and the Municipality of West Grey.
- 1.2 The Consultant shall be paid within 30 days after the submission by the Consultant of a properly prepared invoice to the Municipality of West Grey, subject to West Grey not disputing the submitted invoice.

2.0 Conduct of the Contract

- 2.1 The Municipality of West Grey has conduct of the contract resulting from this RFP. Without limiting the generality of the foregoing, this means that all correspondence related to changes in pricing, delivery, etc. shall be with the Municipality of West Grey.
- 2.2 Where the Municipality of West Grey and the Consultant agree to changes in the contract, except for emergencies, all changes shall be made in writing.
- 2.3 The Consultant agrees to a non-completion by the indicated date, for final report submission of two-hundred dollars per day; unless West Grey approves another arrangement.

3.0 Termination of Contract

- 3.1 The Municipality of West Grey may, by notice of default to the Consultant, immediately terminate part or all of this contract if the Consultant fails to make delivery of the services within the time specified, or fails to perform any other provisions, terms or conditions of this contract within the time specified, or within a reasonable time if no time is specified, as determined by West Grey.

4.0 Contract Disputes

- 4.1 The parties to the contract agree to attempt to resolve disputes arising out of or in connection with this contract, or in respect of any legal relationship associated with it, or from it. The cost of any mediation, should such be required, shall be borne equally by the parties hereto.

5.0 Warranty

- 5.1 The Consultant warrants that its employees have the qualifications, experience, knowledge, skills and abilities necessary to carry out the services and the services will be performed in a competent, efficient and first class manner.

6.0 Indemnification

- 6.1 The Consultant shall indemnify, hold and save harmless the Municipality of West Grey from and against all claims, losses, damages, costs, actions and other proceedings made, sustained, brought or prosecuted in manner, based upon, occasioned by attributable to any injury, including death, property damage, infringement or damage arising from any act or omission of the Consultant, their employees, officers, volunteers, servants, agents or persons from whom the Consultant has assumed responsibility in the performance or purported performance of this contract.
- 6.2 The Consultant shall indemnify the Municipality of West Grey from and against any and all liability or expenses by way of legal costs or otherwise in respect of any claim which may be made for a lien or charge at law or in equity or to any claim or liability.
- 6.3 The Consultant shall pay all royalties and license fees and shall save the Municipality of West Grey harmless from loss on account of suits or claims of infringement of patents in the performance of this contract.

7.0 Taxes

- 7.1 Unless otherwise provided herein, the Consultant shall pay all government taxes in force at the date of the agreement, provided that any increase or decrease in such taxes shall increase or decrease the amount due under the contract accordingly. Invoices shall show the amounts for the appropriate taxes separately, (ie. GST, HST).

8.0 Laws

- 8.1 The laws of Ontario shall govern the contract.
- 8.2 In carrying out its obligations hereunder, the Consultant shall familiarize itself and comply with all applicable laws, bylaws, regulations, ordinances, codes, specifications and requirements of all regulatory authorities, and shall obtain all necessary licenses, permits and registrations as may be required by law.

9.0 Assignment

- 9.1 Neither party to the contract shall assign, sublet or transfer this contract without the written consent of the other.

10.0 Notices

- 10.1 Any notice required to be given or made in this contract shall be given or made in writing and shall be served personally or mailed by registered mail addressed to the Municipality of West Grey and to the Consultant at the address set forth in its Proposal.

PART C – SCOPE OF WORK

1.0 Purpose

The Municipality of West Grey is seeking the services of a consultant to:

- assist in the development of a Corporate Strategic Plan that will focus on the Municipality's principles, services, values and vision for the future;
- engage residents, businesses, community organizations, Municipal Council, Committees of Council, Municipal personnel and other key agencies and individuals in the process of developing the Plan.

2.0 Background

As a dynamic, vibrant community the Municipality of West Grey enjoys the beauty of river-ways, quiet and natural surroundings, is an important public and commercial services provider. Since inception, the Municipality has provided its residents a progressive and desired place to work, live and raise a family.

West Grey Council and Municipal personnel play an important role in community development, livability and general quality of life. Municipal services address the safety, risk, health, social needs and programs that greatly benefit and complement the community.

West Grey Council now wishes to engage all aspects of our community to best establish and secure West Grey's future, through a solidifying of our collective vision, means for sustainability and progressive, caring governance. Through inclusive leadership, community collaboration and meaningful consideration of our future the Municipality of West Grey will achieve a strategic scope that is reflective of our principles, values, physical and fiscal resources, and collective will of our residents.

3.0 Related Policies and Management Plans

The Municipality of West Grey has a number of plans, policies, strategies and both local and regional related information.

It is expected these plans, related documents, and consultation with identified individuals, agencies and community groups will be used to develop West Grey's Corporate Strategic Plan.

4.0 Scope of Work

The Consultant's scope of work is to facilitate and conduct the entire strategic planning process for the Municipality of West Grey with assistance of the West Grey Council and Senior Staff. Unless otherwise directed by West Grey the Consultant's key deliverables are as follows:

- Conduct a review of the current status of the Municipality of West Grey's municipal organization, including existing plans, policies, and long term goals; the prevailing labour Climate; management philosophies of the West Grey Council / Senior Management Team, the Municipality's financial status, and other relevant, related research deemed necessary.

- Based on the Consultant's findings, develop a detailed Strategic Planning Process model complete with key milestones and timelines, for West Grey's consideration and approval.
- Conduct strategic planning orientation workshops for West Grey Council, Senior Managers and other employee groups.
- Conduct and document strategic planning meetings with key organizations and agencies.
- Conduct a comprehensive public consultation process that includes residents, businesses and other community service based groups/agencies; identifying and defining those key values held by the community with respect to key services and future vision.
- Conduct a statistically valid survey that will further assist in identifying and prioritizing community issues. This survey is not only to gauge the community's satisfaction with Municipal services but also to identify community values; and sample opinions and attitudes on a variety of topics including growth and change.
- Prepare drafts of the Strategic Plan that is based on the information gathered at all meetings and via the survey results, for West Grey's review and approval. The Strategic Plan should include, as a very minimum, the following:
 - West Grey's Corporate Mission, Strategic Vision and related goals
 - Key values and guiding principles to assist direction and decision making
 - Recommended actions to achieve strategic vision and goals

Supplementary information should include:

- Summary of the strategic planning process
- List of strategic issues relevant to West Grey
- Performance measurement tools during the implementation phase
- Communications and Marketing Plan

An original proof ready for printing should be in an 8.5" x 11" format, available to West Grey in an electronic format for production in colour. The above scope of work may be adjusted by West Grey as appropriate to achieve a strategic plan that meets the vision of West Grey residents, organizations, agencies and Council.

A final report supporting the Strategic Plan document should include a consolidation of the work completed including the reasoning for all decisions and recommendations. West Grey requires an electronic version of this report. Strategic partners include, but are not limited to the following;

- Various Community & Service Groups (culture, heritage, athletic, seniors, youth, etc.)
- Realty and Development Industry
- Government Agencies
- West Grey Council and Committees of Council
- County of Grey
- Chamber of Commerce and the B.I.A.
- Bluewater District School Board and Bruce Grey Catholic Separate School Board
- Saugeen Valley Conservation Authority
- Durham and Community Healthcare Foundation

The Consultant can expect a close working relationship with West Grey Council, the Chief Administrative Officer and key Municipal personnel throughout the assignment.

West Grey reserves the right to control all aspects of the Strategic Planning process. The Consultant shall not conduct surveys or meetings with staff or other persons without receiving prior approval from West Grey Council.

5.0 General Process

The following is a general description of the process expected in development of the Corporate Strategic Plan. West Grey encourages modification of these general steps by the Consultant to achieve a more enhanced, efficient and/or effective outcome.

- Research & review of West Grey's resource information.
- Initial startup meeting with West Grey Council to confirm and review scope of work.
- Prepare a Project Charter, timeline and key milestones for developing the Corporate Strategic Plan.
- Facilitate meetings and discussions with staff and Council as appropriate.
- Call follow-up meetings as determined beneficial to the project.
- Prepare a comprehensive community consultation process with input from West Grey Council.
- The process will include Council and staff meetings, surveys, public open houses, public meetings, and hosting of events. The consultant will be required to provide information and presentation materials intended to reach a variety of audiences using a variety of mediums.
- Conduct the public consultation process.
- Prepare a preliminary draft strategic plan for Council and public review.
- Review and amend the preliminary draft strategic plan to incorporate public and Council comments.
- Present the revised draft strategic plan at a Council Meeting, in PowerPoint format.
- Amend the revised draft plan as appropriate to respond to feedback from Council and the public.
- Finalize the Corporate Strategic Plan, incorporating Council and community comments.

6.0 Deliverables

- 25 copies of the final plan
- Presentation materials for all meetings and public consultation processes.
- The PowerPoint presentation required for the Council briefing session.
- Preparation of newspaper ads, media releases and other required public notices, and submitting same to the CAO for approval
- Presentation and report on survey results.
- An electronic copy of the Corporate Strategic Plan and supplementary information, in a format suitable for printing on 8 1/2" x 11" pages.
- An electronic copy of the final report and the report supporting the Strategic Plan.
- Written permission for West Grey to reproduce more copies as required.

7.0 Qualifications

The consultant or consulting team shall demonstrate:

- a thorough knowledge and understanding of corporate strategic planning and the development of municipal strategic plans;
- expertise and capacity to perform the necessary public consultation;
- several years of experience in working with local governments in Ontario and demonstrated ability to conduct research and write strategic plans and deliver the plans on time and on budget.

8.0 Format of Proposal

Each proposal should include the following:

- Title Page showing the proponent, contact information and key personnel.
- One page letter of introduction, introducing the proponent(s), company history and expertise.
- Section on Methodology, Information and Pricing; to contain the details, methodology and pricing to be used by the proponent to complete the consulting work. At a minimum, proposals should include:
 - an appreciation of the scope of work for this assignment.
 - proposed methodology and approach to the various tasks considered essential by the consultant, and referenced in this RFP. This should include an explanation of how each of the work components will be undertaken and the length of time required to complete each component;
 - the curriculum vitae of personnel to be assigned to this project;
 - list of previous projects and client/references;
 - a schedule for the completion of the work, specifically referencing the timing of the public consultation process;
 - the total cost for the work, indicating all taxes separately;
 - an indication of costs, fees, expenses and parameters that are NOT included in the proposal;
 - a schedule of fees detailing hourly rates, estimated costs for activities needed to complete each phase of the Strategic Planning process inclusive of disbursements and taxes

Proposal submissions should be a maximum of 25 pages, inclusive of all information indicated.

9.0 Timelines

The work shall commence prior to **July 15, 2015** and the final report shall be submitted prior to **October 16, 2015**; or as otherwise mutually agreed by West Grey and the Consultant.

10.0 Reporting Structure

The consultant's principal contact with the Municipality of West Grey will be the Chief Administrative Officer. The C.A.O. (or a designated individual) will coordinate the assistance necessary to meet the goals and target timelines of this project.

THE CORPORATION OF THE MUNICIPALITY OF WEST GREY EXTENDS THANKS FOR YOUR TIME AND CONSIDERATION IN REVIEW AND RESPONSE TO THIS REQUEST FOR PROPOSAL. WE LOOK FORWARD TO YOUR SUBMISSION.