REQUEST FOR EXPRESSION OF INTEREST

FACILITATOR - STRATEGIC PLANNING PROCESS
TOWN OF MAHONE BAY

1.0 INTRODUCTION

1.1 THE TOWN OF MAHONE BAY

Mahone Bay (herein referred to as the “Town”) is a beautiful town nestled along the shores of the Atlantic Ocean on the South Shore of Nova Scotia near the communities of the Town of Lunenburg and the Town of Bridgewater and located 90km from Halifax Regional Municipality.

Town government consists of 7 elected officials (1 Mayor, 1 Deputy Mayor, and 5 Councillors). The Administrative structure of the Town is a Chief Administrative Officer system.

While smaller centers in Nova Scotia have experienced economic and population declines in the last number of years, Mahone bay is one of the few that has been able to remain vibrant and attract new residents. For instance, the Town's population increased from 904 in 2006 to 943 in 2011. Most of the development in the Town has been residential.

The Town is faced with challenges not unlike those of other Nova Scotia municipalities. With the increasing demands for municipal contribution from other levels of government, and the rising service expectations from local citizens, it is timely to strive for a balanced approach to resource allocation.

Town Council is interested in the development of a government-focused strategic plan. In recent years, the Town has adopted a Sustainability Plan, a Climate Change Action Plan, and a 5-10 Year Capital budget. CBCL have completed a study that identified that the Town's Infrastructure can sustain a population double the present size, and recently the Town's Harbour Development Committee have identified several enhancements and use of the Town's beautiful Harbour that is utilized primary for recreational boating. Some of the issues facing the Town have been identified in a recent brief to the Minister of Service Nova Scotia and Municipal Relations.

To this end, the Town is seeking the services of a facilitator that can lead Town Council and Senior Staff through a Strategic Planning Process, with the goal of ultimately developing a Strategic Plan.
1.2 PROPOSAL SUBMISSION

Proposals will be received until January 29, 2014 at 4:00 p.m. local time, at the Mahone bay Town Office. The individual or company who submits a proposal is hereafter referred to as “Proponent”. Proposals shall be addressed to the following contact person:

clerk@townofmahonebay.ca

James A Wentzell
493 Main Street,
Mahone bay, NS
B0J 2E0
902-624-8327

Proponents shall each submit their proposal in original form by “email” and shall include any Appendix to the Proposal. The proposal shall be submitted in Microsoft Word or pdf format. The subject line in the email should state:

“PROPOSAL FOR FACILITATOR - STRATEGIC PLANNING PROCESS”

Late Proposals will not be accepted

No Proposals may be withdrawn after closing. Prior to closing, Proposals may be withdrawn upon written request signed by an officer of the Proponent’s company, or by the Proponent in the case of a sole practitioner Proposal submission.

The Town of Mahone bay will short list the submissions received and conduct interviews on February 3, 2014. Proponents will be provided with results if or when the contract is awarded.

1.3 ACCEPTANCE OF PROPOSALS

The Town of Mahone bay, at its sole discretion and determination, may waive minor differences in the proposals provided the differences do not violate the proposal intent. No terms or conditions shall be implied, based on any industry trade practice or custom, any practice or policy of the tender or Town’s or otherwise, which is inconsistent or conflicts with the provisions contained in this document.

The Town of Mahone bay reserves the right, at its sole discretion, to reject any or all Proposals. This Request for Proposal should not be construed as a contract for the purchase of goods or services. The Town of Mahone bay reserves the right to accept any Proposal that it considers to be in its best interest or to reject any or all Proposals, as the Town of Mahone bay deems to be in its best interest. Price will only be one factor which the Town of Mahone bay will consider in selecting a Proponent. Other factors, including but not limited to, background, experience in conducting similar studies, references and timeliness, will also be selection factors.
The Town of Mahone bay also reserves the right to waive formality, informality or technicality with the acceptance of Proposals for this study. Any Proposal not supported by the information requested in this Proposal call may be rejected. The Town of Mahone Bay also reserves the right to negotiate with any Proponent who has submitted a Proposal. The Proponent, if any, whose Proposal is accepted by the Town of Mahone bay, is hereafter, referred to as the “Consultant”.

1.4 LIABILITY OF ERRORS

While the Town of Mahone bay has made considerable effort to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Town of Mahone bay, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

1.5 PAYMENT INFORMATION

The Consultant will receive compensation upon project completion.

1.6 INFORMATION COLLECTED

The Consultant is advised that all information collected in regard to this contract is considered to be the property of the Town of Mahone bay. A copy of such information shall be turned over to the Town of Mahone bay at the end of the study. The cost to produce this copy shall be included in the Proposal expenses.

1.7 CONFIDENTIALITY

The Proponents are advised that any information provided by the Town of Mahone bay, and information collected by the Consultant in relation to this project, is to be treated as confidential and shall not be provided to a third party without prior written approval of the Chief Administrative Officer of the Town of Mahone bay.

1.8 OWNERSHIP OF PROPOSALS AND FREEDOM OF INFORMATION

All documents, including proposals, submitted to the Town of Mahone bay, become the property of the Town of Mahone bay and are subject to disclosure under the Nova Scotia Freedom of Information and Protection of Privacy Act (FOIPOP). By submitting a Proposal, the Proponent, thereby, agrees to public disclosure of its contents subject to FOIPOP criteria. Any information the Proponent considers “personal information” because of its proprietary nature should be marked as “confidential”, and will be subject to appropriate consideration as defined with the Nova Scotia Freedom of Information and Protection of Privacy Act (Municipal Government Act, Part XX).
1.9 PROONENTS EXPENSES

The Town of Mahone bay is not liable for costs incurred by the Proponent in responding to this Request for Proposal. Proponents are solely responsible for their own expenses in preparation, delivery, or presentation of the Proposal, and for any subsequent negotiations with the Town of Mahone bay.

1.10 PROPOSAL CHANGES AND AMENDMENTS

All Proponents will be notified, in writing, regarding any changes made to the Request for Proposal or any appendices, or any change in the closing date or time. When changes occur within five business days of the close of the Proposal, the Proposal closing date may be extended to allow for a suitable number of Proposal preparation days between revised closing date and the issuance of the change.

1.11 ENQUIRIES

All enquiries related to this Request for Proposal shall be directed to the following person or his/her designate. Information obtained from any other source is not official:

James A Wentzell  
Chief Administrative Officer  
Town of Mahone Bay

2.0 PROPOSAL REQUIREMENTS

2.1 PROPOSAL PREPARATION

2.1.1 Proposal Content

In order to receive full consideration during evaluation, Proposals shall include the following:

a) A detailed Work Plan, describing the work or tasks to be undertaken by the Proponent, including work steps and methodology. Items to be delivered at each step shall be identified;

b) A Project Schedule outlining the time frames of associated work or tasks to be undertaken by the Proponent;

c) The name of the contact person for the Proponent who shall have the responsibility of discussing any project matters with the Town of Mahone bay;

d) A brief history of the Proponent, including each separate professional or firm if the Proponent is a consortium or joint venture;
e) A listing of previous work experience in the area of Strategic Planning similar to that proposed in this Request for Proposal, including three references;

h) An all-inclusive Project Price, as well as, a breakdown of the project price in relation to the Work Plan and Project Schedule;

j) Preliminary information that the Proponent expected the Town of Mahone bay to provide.

2.2 PROPOSAL PRICING

Proposals shall quote an all-inclusive, fixed price for completion of the study. This all-inclusive price shall include all factors which will affect the cost of the proposal, such as but not limited to, travel, reproduction costs, disbursements, and miscellaneous expenses. The all-inclusive price will be the project cost for the purpose of evaluation, exclusive of taxes. Prices quoted are to be in Canadian Dollars.

Proposals shall also include a schedule outlining a breakdown of project fees.

The Proposal shall clearly indicate the number of hours allocated for each phase of the work schedule.

All Proponents shall assume that any costs to rent meeting room facilities only and provide meals/refreshments for all participants will be assumed by the Town of Mahone bay. Where Proponents are providing any meeting facilities, accommodations, meals or refreshments for participants, these shall be priced separately.

2.3 CHANGES TO PROPOSAL WORDING

The Proponent will not change the wording of the Proposal after closing. No words or comments will be added to the general conditions or detailed specifications unless requested by the Town of Mahone bay for purposes of clarification.

The Proponent may change a previously submitted Proposal by withdrawal, amendment or submission of a replacement if done prior to the closing date and time. This information or request should be submitted in writing on company letterhead or equivalent, and contain the signature of the individual or individuals submitting the original Proposal.
2.4 ADDITIONAL TERMS

2.4.1 Sub-Consultants

The Proponents shall indicate whether they will solely undertake the work, or whether sub-consultants will be used. The list of the sub-consultants, their work scope and staff cannot be changed following the signing of a contract, without written permission from the Chief Administrative Officer for the Town of Mahone Bay.

Any sub-consultant to any firm, or individual whose current or past corporate or other interests may, in the sole opinion of the Town of Mahone bay, give rise to a conflict of interest in connection with this project, will not be permitted. The Town of Mahone bay retains the right to make any such determination of conflict at its sole, unfettered, discretion.

3. SCOPE OF WORK

3.1 The Proponent shall work with Council and Senior Staff to develop a Strategic Planning Process that will guide Council in the development of a Strategic Plan.

3.2 The Proponent will be expected to familiarize themselves with the functions and issues facing the Town of Mahone Bay through the review of relevant documentation. Documents would include those listed in section 1.1.

3.3 The Proponent shall then lead Town Council through a Strategic Planning Process which shall involve the organizing and facilitation of Strategic Planning Meetings with Town Council and Senior Staff (separately, if/when appropriate) to develop a Mandate, Mission Statements, Goals and Objectives to meet the Goals and Objectives or variations of such, as indicated in the proposal.

The first strategic planning meeting shall be scheduled to occur in February and at a time convenient for Town Council.

3.4 The Proponent shall use the results of the Strategic Planning Meetings to develop a written Strategic Plan for approval by Town Council. The Strategic Plan shall clearly identify the Town’s Mandate, Mission Statements, Goals and Objectives, or variations of, as indicated in the proposal. This written report must be submitted to the Town of Mahone bay no later than June 30, 2014. with a preliminary draft available by March 31, 2008.

3.5 The Proponent is not expected to develop the Implementation Plan, but rather provide Council and Senior Staff with the knowledge to develop the necessary Implementation Plan.
4.0 PROPOSAL EVALUATION

4.1 EVALUATION OF PROPOSAL

All proposals will be evaluated by the Town Council of the Town of Mahone Bay.

4.2 MANDATORY CRITERIA

Proposals will be first evaluated to establish compliance with the mandatory clauses of this Request for Proposal. Proposals not meeting the mandatory requirements will receive no further consideration during the evaluation process. The following are the mandatory requirements:

- Proposals shall be submitted by the deadline;
- Proposals shall be submitted as per Subsection 1.2 of this Request for Proposal; and
- Proposal content shall be as per Section 2 and Section 3 of this Request for Proposal.

4.3 OTHER CRITERIA

The Council of the Town of Mahone Bay will evaluate the Proposals through consideration for the proposed Work Plan, Methodology, Costs, Clarity, Work Team, Related Experience, References and Project Schedule, and will evaluate each Proposal meeting the mandatory criteria based on these factors. Price, therefore, will only be one of the factors considered in evaluating Proposals.

As per Section 1.3, the Town of Mahone bay reserves the right to choose the Proposal deemed to be in its best interest. The Town of Mahone bay may, in its sole discretion, choose to reject any or all of the Proposals.

END OF DOCUMENT