



**REQUEST FOR PROPOSAL
Terrace Bay 2024-005 V.1
Terrace Bay Five-Year Strategic Plan**

**Proposal Closing Date and Time
June 28, 2024
1:00pm, local time**

**Proposals are to be delivered by email to:
Jon Hall
CAO/Clerk
cao@terracebay.ca**

1. Project Information

1.1. Purpose:

Develop a 5-year strategic plan (“the Plan”) that will allow the Township of Terrace Bay (Township) to strategically manage community priorities. The plan will create a short- medium and long-term community priorities that will focus on economic, employment and community development. The Plan will assist decision making based on facility status, community needs, regional context, and financial considerations.

1.2. Community Background & Introduction:

Established in the late 1940's, Terrace Bay is a picturesque Northwestern Ontario Township within the District of Thunder Bay. The community borders pristine boreal forest to the east, west and north and the world's largest source of fresh water, Lake Superior, to the south. Terrace Bay is a full-service community, home to 1528 residents and offers an excellent quality of life thanks to its beautiful vistas, diverse recreation, and affordable lifestyle. The nearest communities to the Township are Schreiber (14km west) and Marathon (82km east). The closest metropolitan areas to Terrace Bay are Thunder Bay (219km west) and Sault Ste Marie (481km east). As a single-industry community Terrace Bay has been dramatically impacted by the [temporary idling of its largest employer](#) in January. Terrace bay is seeking to leverage a strategic plan into diversify its economy and reduce dependence on the forestry industry.

The Township is seeking an innovative approach to strategic planning that will be demand driven and integrate the Township's mandate concerning economic development, recreation, and resident quality of life. The Plan will be influenced by existing community reports, stakeholder engagement as well as feedback from the general public. Consultants must ensure the priorities and implementation directions are fiscally appropriate for the Township. The Township will look for an approach that has regard for the provision of sustainable facilities, programs and services that supports resident's dynamic needs. The Plan will provide a framework to manage and grow the community consistent with leading industry standards and best practices, for the next five years.

1.3 Reference Documents

[Terrace Bay Strategic Plan 2020-2023](#)

[Terrace Bay Strategic Plan \(2015\)](#)

[Terrace Bay 5-Year Marketing Plan \(2023-2028\)](#)

[Terrace Bay Asset Management Plan \(2020\)](#)

[Terrace Bay Service Delivery Review \(2019\)](#)

[Terrace Bay Waterfront Development Study \(2014\)](#)

1.4 Project Scope

Develop a five-year community and organizational strategy that includes a long-term vision and values, medium term objectives and priorities and short-term action plans. The selected proponent

should be able to determine which planning model or model(s) would be best suited to meet the needs of the Township. Proponents are to develop a prioritized implementation plan which is clear, concise, user friendly, flexible and can be used as a guiding document for Council and Administration. The Plan will provide sound policy and rationale for future funding requirements and opportunities without raising unrealistic expectations.

The selected proponent must undertake a comprehensive public consultation process that is targeted and focused on its approach. Consultants will provide residents and stakeholders with multiple opportunities to provide input on their expectations and goals for the future of Terrace Bay. Proponents are requested to provide detailed information on options for community and staff consultation as part of their proposal.

Key stakeholders are to be kept informed of research progress and specific opportunities to be engaged. Consultants are to provide progress reports for each milestone in the approved work plan to the Township, as appropriate.

The Plan document should be structured in four parts:

- a) Background information
- b) Analysis
- c) Recommendations
- d) Implementation

Consultants must deliver a Strategic Plan Final Report Presentation, in-person or digitally, to Terrace Bay Council at a regularly scheduled Council Meeting.

Consultants are responsible for recognizing FedNor as a funding partner in the Final Report.

1.5 Key Deliverables

Through a comprehensive review and consultation process, the Township requires the following key deliverables:

- a. Establish current community needs while identifying gaps and priorities with respect to facilities, community programs, services, and economic opportunities.
- b. Community and staff input, including gathering of stakeholder information as well as using appropriate methods of communication and engagement.
- c. For the purposes of making the community strategic plan as accurate, inclusive, and well-rounded as possible, Proponents must demonstrate how they plan on engaging all aspects of our community (First Nations, local Clubs/Organizations/Not-for-Profits, and other Government agencies).
- d. Needs assessment/environmental scan – reviewing existing plans and documents pertinent to the comprehensive community strategic plan, identifying trends and patterns that are applicable. Process and meeting facilitation, assisting discussion and decision making and ensuring that

conversations are forward-looking, action oriented and move the participants towards creating a shared future.

- e. Planning, coordinating, and taking minutes of all meetings, including community/employee consultation sessions and meetings with Council and Staff. This can be in assistance with assigned Township staff.
- f. Organize and facilitate public meetings to disseminate and gather information relevant to the process.
- g. Plan documentation, including development of an interim and final report for the project, including executive summary.
- h. Provide an implementation plan containing short-, medium-, and long-term actions for the community.
- i. Study of the Township's demographic profile - recreational, educational, economic, social, and attitudinal trends, and their impact on, and relationship with, existing and future community needs.

1.6 Project Schedule

Project is expected to be completed by December 31, 2024

2. Proposal Submission

2.1. General

- a. Proposals are to be sent via email and marked confidential.
- b. All proposal information and pricing shall be legibly written in ink or by computer.
- c. The Proponent is required to detail a project timeline that indicates when deliverables will be produced.
- d. Proponents are required to conform to the conditions listed above and those failing to do so, may be disqualified.
- e. Clearly identify the name, title, mailing address, e-mail, and telephone of the person who will be the Township's point of contact.

2.2. Corporate Profile and Experience

Proponents must include a summary of their company's background, area of expertise, and number of project employees. Proponents shall list any subcontractors or sub-consultants they intend to use and provide a similar summary. Proponents shall provide a project organization chart and a table clearly indicating what role and responsibility each team member will play, the anticipated hours of each, and the total role and project hours.

Proponents shall include at least three (3) project abstracts that clearly outline previous projects with similar services that have been successfully completed by their company within the past three (3) years. The project abstracts shall clearly note the project value, a comparison of budget versus actual costs incurred, project constraints, location, client names, and references.

2.3. Approach & Methodology

Proponents are to confirm their understanding of the scope of work and clearly define and describe how their proposed approach would meet those requirements. The work plan should include a scheduling of activities and resources necessary to meet the project objectives, including the provision of a quality assurance and control plan that ensures senior technical review of relevant project activities.

2.4 Quality Assurance & Control

Strategic decisions will be based on the collected data and analysis results provided by the Consultant. Proponents shall provide a description of an internal quality assurance and control program designed to minimize potential sources of error that could affect the analysis and negatively impact decision-making processes on which recommendations to the Township are made.

2.5 Schedule Of Work

Proponents are to provide a detail work plan including proposed start date, progress meeting dates, milestones, other key events, and major project deliverables shall be clearly identified on the project schedule. The schedule shall identify the critical path, delineate what resources will be required, and when they will be required.

2.6 Budget and Cost

Maximum total cost of the project, for each project component, broken down by deliverable, where major tasks or milestones, travel, report writing, and other disbursements are listed separately.

Proponents shall provide in their cost proposal: estimates of material, labour, travel expenses, warranty, and a total upset price, including HST, with a breakdown of the major items described in the Project Scope section. Proponents are encouraged to include any other cost related information they deem relevant.

Proponents are to include a description of the preferred schedule(s) and method of payment.

2.7 Value Added

Proposal demonstrates that thought and consideration have gone into answering the goals of the project, highlighting any additional items or approaches.

Innovative procedures, engagement methods and/or documentation output presented in the Proposal.

Familiarity with Terrace Bay, northern Ontario or rural municipalities.

The Township recognizes that “best value” is the essential component of this project, and therefore the Township will give careful consideration to technical and cost factors in its selection criteria.

2.8 References

Proponents must provide a minimum of three references. References should refer to recent or current projects or contracts of a similar type, scope, and magnitude as that to be undertaken on behalf of the Township. Each reference should include: the name of the person, organization or municipality, a contact name, address and phone number, and a brief description of the work performed, including the duration of the project. The Township of Terrace Bay may contact any or all the references provided in its evaluation of the proposal.

2.9 Submission General Conditions

A) Disqualification

The Township reserves the right in its sole discretion to reject any or all proposals. Failure of the Proponent to satisfy any term or condition of this RFP may result in the rejection of said Proposal. Further, any incomplete proposals, qualified proposals, proposals not properly signed/dated, proposals received after the closing date/time, proposals completed in pencil, proposals with incomplete calculations, and proposals lacking required information may be rejected as incomplete.

B) Examination of Documents

Each Proponent must satisfy himself or herself by a personal study of the RFP documents, by budgetary calculations, and scope of work, respecting the conditions existing or likely to exist in connection with the proposed work. There will be no consideration of any claim, after submission of Proposals, that there is a misunderstanding with respect to the conditions imposed by this RFP. Prices must include all incidental costs and the Proponent must be satisfied as to the full requirements of the RFP.

C) Addenda

If the Township determines that an amendment is required to this RFP, the Township will send an electronic copy of the written addendum to each Proponent that submits a proposal.

D) Proposal Withdrawal or Replacement

Any Proposal may be withdrawn prior to the scheduled time for Proposal Closing by submitting written notice to the RFP contact. Replacement Proposals are welcome until the Proposal Closing.

E) Amendments to Proposals

Proposals may be amended in writing and delivered to the closing location before the closing time. Such amendments should be signed by the authorized signatory of the Proponent and hand delivered to the Community Development Supervisor

F) Clarification of Submissions by the Municipality

To assist in the examination, evaluation and comparison of submissions, the Municipality may, at its discretion, ask the Proponent for clarification of its proposal. The request for clarification and the response shall be in writing and no change in substance of the submission shall be sought, offered, or permitted.

3. Submission Instructions

3.1 Address for Submission of Proposals

cao@terracebay.ca

OR

Jon Hall
1 Selkirk Avenue
PO Box 40
Terrace Bay ON
P0T 2W0
807 825 3315 x7108

3.2 Key Dates

Proposal Submission Deadline: Friday June 28, 2024

3.3 Inquiries

All inquiries related to this Proposal should be directed in writing to the person(s) named below (the "Township Representative(s)"). Information obtained from any person or source other than the Township Representative(s) may not be relied upon.

Name: Jon Hall

Email: cao@terracebay.ca

Phone: 807 825 3315 x7108

The Township reserves the right not to respond to inquiries made after the date mentioned in the previous schedule. Inquiries and responses will be recorded and may be distributed to all Proponents in the form of addenda at the discretion of the Township.

Proponents finding discrepancies or omissions in the Contract or Proposal or having doubts as to the meaning or intent of any provision, should immediately notify the Township Representative(s). If the Township determines that an amendment is required to this Proposal, the Township Representative(s) will issue an addendum. No verbal conversation will affect or modify the terms of this Proposal or may be relied upon by any Proponent.

3.4 Opening of Proposals

The Township intends to open and evaluate Proposals internally. There will not be a public opening.

4. Evaluation & Selection

4.1 Evaluation Team

The evaluation of Proposals will be undertaken on behalf of the Township by the Evaluation Team. The staff-based Evaluation Team may consult with others including Township staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required. The Evaluation Team will give a written recommendation for the selection of a Preferred Proponent or Preferred Proponents to the Township Representative.

4.2 Evaluation Criteria

The Evaluation Team will compare and evaluate all Proposals to determine the Proponent's strength and ability to provide the services in order to determine the Proposal, which is most advantageous to the Township, using the following criteria:

All Proposals will be evaluated by Terrace Bay in its sole discretion. The Evaluation Team will not be limited to the criteria referred to below, and the Evaluation Team may consider other criteria that the team identifies as relevant during the evaluation process. The Evaluation Team may apply the evaluation criteria on a comparative basis, evaluating the Proposals by comparing one Proponent's Proposal to another Proponent's Proposal. All criteria considered will be applied evenly and fairly to all Proposals.

- A) Desirable Criteria Points Qualifications & Experience (35)
 - a. Three Project references (3)
 - b. Specialties or capabilities of the Proponent
 - c. Provides evidence of being able to successfully perform this work on or ahead of schedule.
 - d. Credentials of staff or subcontractors assigned to this project.
 - e. Experience in the preparation of Strategic Plans or similar planning work.
 - f. Ability to distill research into plain language documents free of technical jargon.

- g. Project Team, roles and responsibilities, and, if applicable methodology.
- h. Suitability and comprehensiveness of proposal, indicating a thorough understanding of the request and the expected deliverables.
- i. Shows an understanding of the consultative process with community and stakeholders.
- j. Comprehensiveness of the proposed strategy and likelihood of success in reaching the most diverse community members.
- k. Shows an understanding of the reporting and interaction with the Township Project Manager
- l. Technical expertise in community engagement, policy development, and graphic design
- m. Project design for each phase and tasks listed and creativity and feasibility in project delivery.
- n. Completeness, overall quality, and level of details submitted with the proposal.
- o. Total number of hours proposed and distribution of those hours amongst the Project Team.
- p. Proponents commence implementation plan.

B) Proposed Fees (15)

- a. The fee is fixed and competitive for the work identified and with other proposals.
- b. Pricing will include structure fees, disbursements, costs, hourly rates.
- c. Proposal Cost and perceived overall value of services proposed.

C) Proposal Quality, Including Approach and Methodology (20)

- a. Ease of understanding.
- b. General approach.
- c. Proposed public and stakeholder consultation.
- d. Understanding of project objectives.
- e. Quality and presentation of the proposal; and
- f. Proposed level of effort.

D) Experience in Completing Similar Plans (20)

- a. Experience with similar projects.
- b. Experience with rural northern communities.
- c. Experience with municipalities of 10,000 people and less.
- d. Familiarity and experience in Northwestern Ontario.
- e. Public and Stakeholder Engagement experience.
- f. Project Team qualifications.
- g. Local knowledge, understanding of the area, and direct experience.

E) Work Plan & Schedule (10)

- a. Proponents clearly identify project milestones.
- b. Proponents are able to meet time constraints.

It should be clearly understood that the Township has the right to assign weighting to each of the five (5) above mentioned categories and if any proposal submitted fails to include any mandatory requirements as outlined in the Terms of Reference, the proposal may be disqualified.

4.3 Additional Information

The Evaluation Team may, at its discretion, request clarifications or additional information from a Proponent with respect to any Proposal, and the Evaluation Team may make such requests to only selected Proponents. The Evaluation Team may consider such clarifications or additional information in evaluating a Proposal.

4.4 Interviews

The Evaluation Team may, at its discretion, invite some or all the Proponents to appear before the Evaluation Team to provide clarifications of their Proposals. In such event, the Evaluation Team will be entitled to consider the answers received in evaluating Proposals.

4.5 Multiple Preferred Proponents

The Township reserves the right and discretion to divide up the Services; either by scope, geographic area, or other basis as the Township may decide and select one or more Preferred Proponents to enter discussions with the Township for one or more Contracts to perform a portion or portions of the Services. If the Township exercises its discretion to divide up the Services, the Township will do so reasonably having regard for the Proposal and the basis of Proposals.

In addition to any other provision of this Proposal, Proposals may be evaluated based on advantages and disadvantages to the Township that might result or be achieved from the Township dividing up the Services and entering into one or more Contracts with one or more Proponents.

4.6 Negotiation of Contract and Award

If the Township selects a Preferred Proponent or Preferred Proponents, then it may:

- a) Enter into a Contract with the Preferred Proponent(s); or
- b) Enter into discussions with the Preferred Proponent(s) to attempt to finalize the terms of the Contract(s), including financial terms, and such discussions may include:
 - i. Clarification of any outstanding issues arising from the Preferred Proponent's Proposal;
 - ii. Negotiation of amendments to proposed work plan and/or scope of the Proposal of the Preferred Proponent
 - iii. Negotiation of amendments to the Preferred Proponent's price and/or scope of Services if:
 - The Preferred Proponent's financial Proposal exceeds the Township's approved budget, or

- The Township reasonably concludes the Preferred Proponent's financial Proposal includes a price that is unbalanced, or
 - A knowledgeable third party would judge that the Preferred Proponent's price materially exceeds a fair market price for services like the Services offered by the Preferred Proponent as described in the Preferred Proponent's Proposal; or
- iv. If at any time the Township reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached within a reasonable time, give the Preferred Proponent(s) written notice to terminate discussions, in which event the Township may then either open discussions with another Proponent or terminate this Proposal and retain or obtain the Services in some other manner.
- c) The Corporation of the Township of Terrace Bay reserves the right to accept or reject any or all proposals. There shall be no obligation of Terrace Bay to proceed with work set out in a Proposal, if accepted, until an Agreement is executed by the Township and the Successful Proponent. Any proposals prepared in response to this RFP shall be prepared at the cost of the Proponent.

5. Selected Proponent Standard Terms and Conditions of Contract

5.1 Indemnification and Insurance

The successful Proponent shall indemnify, defend and save harmless the Township of Terrace Bay from and against any liability, claims, damages, losses, expenses, actions and suits whatsoever, including injury or death of others or any employee of the Proponent caused by or arising out of performance act, or omission of any terms of the final contracts. This indemnification shall survive the termination or expiry of the contract.

The successful Proponent shall provide and maintain during the term of the contract, Commercial General Liability insurance which shall include coverage of Professional Liability/Errors and Omissions Insurance in a form acceptable to the Township and subject to limits of not less than \$5,000,000 inclusive per occurrence for bodily injury, death and damage to property including loss of use thereof.

The successful Proponent shall provide and maintain during the term of the Contract liability insurance in respect to owned and leased licensed Motor Vehicles subject to a limit not less than \$2,000,000 inclusive per occurrence for bodily injury, death and damage to property including loss of use thereof.

Liability insurance coverage shall not be subject to a deductible.

It is understood and agreed that the coverage provided by the policy will not be changed or amended in any way nor cancelled until thirty (30) days after written notice of such change or cancellation shall have been given to all Additional Insured.

At the time of entering into the contract, the successful Proponent shall provide evidence in the form of a Certificate of Insurance of the insurance coverage to the Township in respect to this Contract. If the contract period extends beyond the term of the insurance policy, the successful Proponent shall provide to the Township a renewed insurance certificate thirty (30) days prior to the policy's expiry date.

5.2 Confidentiality

Material provided to Proponent by the Township must be kept confidential (unless already identified as public documents) including records and information relating to this work. All correspondence, documentation, and information provided by the Township to the Proponent in connection with this RFP, or the acceptance of any proposal, remains the property of the Township. All documents shall subject to the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA). Any documents and information provided to the Proponent by the Township shall not be used for any purpose other than for replying to this RFP, and for fulfillment of any related commitments.

5.3 Conflict of Interest

In its Proposal, the Proponent shall disclose to the Township any potential conflict of interest that might compromise the performance of the work. If such a conflict of interest does exist, the Township may, at its discretion, refuse to consider the Proposal. If, during the Proposal evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to a potential conflict of interest, then the Proponent will so inform the Township. If the Township requests, the Proponent will refuse the new assignment or take such steps as are necessary to remove the conflict of interest.

5.4 Costs Incurred by Proponents

All costs and expenses incurred in the preparation and submission of proposals shall be borne by the Proponent. No payment will be made for any proposals received, or for any other effort required of or made by the Proponent prior to the commencement of work defined by the proposal approved by the Township. There shall be no direct payment for the preparation and submission of Proposals, or to attend interviews in response to this Request for Proposal.

Every effort will be made to accommodate interviews by conference call and/or Skype where appropriate to minimize any related costs to the Proponent.

5.5 Errors and/or Omissions

It is understood and acknowledged that while the RFP includes specific requirements, a complete review and recommendation is required. Minor items not herein specified, but obviously required, shall be provided as if specified. The Proponent shall satisfy themselves fully as to the extent of the work required and shall provide all services required to complete the intent of the project. Any misinterpretation of requirements within this request for Proposal shall not relieve a proponent of the

responsibility of providing the required services if a Proposal is accepted and provide a contract executed between the Proponent and the Township.

5.6 Influence

Proponents and their agents will not contact any member of the Township Council or Township Staff with respect to this RFP, other than the Township Representatives as named within this document. Any person, company, corporation, or organization that attempts to influence the outcome of any Township purchasing or hiring process shall be disqualified, and the person, company, corporation, or organization may be subject to exclusion or suspension from this or other works with the Township.

5.7 Non-Collusion

A Proponent shall not discuss or communicate, directly or indirectly, with any other Proponent or their agent or representative about the preparation of the Proposals. Each Proponent shall attest that its participation in the RFP process is conducted without any collusion or fraud. If the Township discovers there has been a breach of this requirement at any time, the Township may not consider a proposal or execute an agreement with the successful Proponent, if any.

5.8 Assignment of Agreement

It is mutually agreed and understood that the Proponent shall not assign, transfer, convey, sublet or otherwise dispose of the contract, if one is awarded, or his right, title or interest therein, or his power to execute such contract, to any other person, firm, company or corporation without the previous written consent of the Municipality.

5.9 Ownership of Proposals and Freedom of Information

All proposals submitted to the Township become the property of the Township and as such are subject to disclosure under Ontario's *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA). By submitting a proposal, the Proponent agrees to public disclosure of its contents as required under this Act. The Proponent's name at a minimum shall be made public on request. 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 within the Act.

5.10 Accessibility

The Township of Terrace Bay is committed to the accessibility principles of preventing and removing barriers in accessing goods and services for people with disabilities and is bound by the Standards under the Accessibility for Ontarians with Disabilities Act, 2005 as may be amended from time to time.

Regulations enacted under the Act apply to every designated public-sector organization and other third parties that provide goods and services to the members of the public. The consultant/contractor, and all sub-contractors hired by the consultant/contractor in the completion of its work, will meet or

exceed compliance with all applicable regulations under the Accessibility for Ontarians with Disabilities Act, 2005 as may be amended from time to time.

It is the consultant/contractor's responsibility to ensure they are fully aware of and meet all requirements under the Act. A Declaration of Accessibility Compliance will be required by the successful bidder.