

REQUEST FOR PROPOSALS

#2017-01

MUNICIPAL GROWTH MANAGEMENT STUDY

Issued by the Communities of the West River Group, as comprised of the municipalities of Afton, Bonshaw, Meadowbank, New Haven-Riverdale and West River

Date Issued: 25-09-2017

Submission Deadline: 2 p.m. (AST), 31-10-2017

Submission Timeframes: 11 a.m. to 4 p.m. (AST) on Tuesdays, Wednesdays and Thursdays (with a 2 p.m. AST deadline on Tuesday, 31-10-2017)

Submission Location: Community of Afton, 1552 Route 19, New Dominion, PE C0A 1H6

RFP Contact: Elizabeth Wilson, Community of Afton, Councilor

Email Contact: westrivergroupei@gmail.com

Telephone Contacts: 902 394-4006 or 902 675-2842

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1. INVITATION AND SUBMISSION INSTRUCTIONS

1.1. INVITATION TO PROPONENTS

The Communities of the West River Group invite proposals from qualified Proponents to prepare a Municipal Growth Management Study. The Communities of the West River Group consist of the five municipalities of Afton, Bonshaw, Meadowbank, New Haven-Riverdale and West River.

1.2. RFP CONTACT

For the purposes of the procurement process, the Request for Proposals (RFP) contact shall be:

Elizabeth Wilson, Member, Communities of the West River Group

Email: WESTRIVERGRUPPEI@GMAIL.COM

Tel: (902) 394-4006, (902)675-2842

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials or other representatives of the Communities of the West River Group, other than the RFP Contact or their designate, concerning this RFP. Failure to adhere to this rule may result in the disqualification of the Proponent and the rejection of a Proponent's proposal.

1.3. ALL NEW INFORMATION BY WAY OF ADDENDA

The Communities of the West River Group are under no obligation to provide additional information regarding this RFP. The Communities of the West River Group will not be responsible for any misunderstanding on the part of the Proponent concerning this RFP or its process.

This RFP may be amended only by addendum in accordance with this section. If the Communities of the West River Group, for any reason, determine that it is necessary to provide additional information relating to this RFP, such information will be communicated by addendum on the Prince Edward Island Tendering Site. Each addendum will form an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by the Communities of the West River Group on the Prince Edward Island Tendering Site and will be deemed to have read all posted addenda. Changes communicated in any other manner shall not be binding upon the Communities of the West River Group. Proponents shall not rely upon changes communicated in any other manner. By submitting a proposal, a Proponent is deemed to have received and understood the RFP, including any and all addenda.

1.4. TYPE OF CONTRACT

The successful Proponent shall be required to enter into an agreement with the Communities of the West River Group to complete the Scope of Work described in Section 2 of this RFP.

1.5. RFP TIMETABLE

Activity	Deadline
Issue date of RFP	September 25, 2017
Deadline for written questions	October 2, 2017
Deadline for issuing addenda	October 23, 2017
Timeframes for submission of proposals	11:00 a.m. to 4:00 p.m. on Tuesdays, Wednesdays and Thursdays
Deadline for submission of proposals	2:00 p.m., October 31, 2017
Anticipated execution of agreement	November 20, 2017
Anticipated completion of project	August 31, 2018

This RFP timetable is tentative only, and may be changed by the Communities of the West River Group at any time.

1.6. SUBMISSION LOCATION AND DEADLINE

The Communities of the West River Group will accept proposals to prepare a Municipal Growth Management Study until 4:00 pm, Atlantic Standard Time on October 31, 2017, at the Community of Afton, 1552 Route 19, New Dominion, PE COA 1H6. All proposals should be delivered to the lower level, side entrance, MacEwen Room.

Proposals may be delivered in-person, by post, or by courier to the address listed above by the closing time and date specified between the hours of 11:00 am and 4:00 pm AST on Tuesday, Wednesdays and Thursdays. Proponents should note that the cut-off time to submit proposals on the deadline of Tuesday, October 31, 2017 is 2:00 p.m. AST. Proposals received after the submission deadline will not be considered. The Proponent is solely responsible for the delivery of its proposal to the exact location indicated in this RFP on or before the submission deadline. The Communities of the West River Group do not accept any responsibility for proposals delivered to any other location by the Proponent or its delivery agents.

1.7. SUBMISSION FORMAT

Proponents should submit proposals in a sealed package. The sealed package should contain a separate sealed technical proposal package and a separate sealed financial proposal package. The sealed proposal package should be prominently marked with the RFP title (see RFP cover),

the RFP Contact details, and the full legal name and return address of the Proponent. All proposal packages should contain the following:

1. **Technical proposal package:** The technical proposal package should be sealed. It should be prominently marked as “Technical Proposal” and labeling should include the RFP title (see RFP cover) and the full legal name and return address of the Proponent. The technical proposal package should contain ten (10) copies of the technical proposal. In the interest of sustainability, please refrain from using any unnecessary fastening or presentation materials when submitting the technical proposal.
2. **Financial proposal package:** The financial proposal package should be sealed. It should be prominently marked as “Financial Proposal” and labeling should include the RFP title (see RFP cover) and the full legal name and return address of the Proponent. The financial proposal package should contain ten (10) copies of the financial proposal. In the interest of sustainability, please refrain from using any unnecessary fastening or presentation materials when submitting the financial proposal.

The Communities of the West River Group shall not accept proposals submitted by facsimile transfer, email, or any other electronic means.

1.8. CONTENTS OF TECHNICAL PROPOSAL

The technical proposal should be based on the Project Scope of Work described in Section 2 and the Proponent Qualifications described in Section 3. It should demonstrate clearly how the Proponent meets the qualifications and how they will achieve project deliverables, with reference to projects of comparable scope and scale.

At a minimum, the technical proposal must include the following information:

- **Project Team and Qualifications:** a description and history of the services offered by the Proponent, a description of each team member’s qualifications and experience, and the resumes of each team member proposed to be involved in the Municipal Growth Management Study on behalf of the Proponent;
- **Experience and References:** a description of similar projects undertaken by the Proponent and contact information (email and telephone) for a reference for each listed project;
- **Team Organization:** identification of the Project Manager, identification of the role of all team members included in the Project Team (including the years of experience and the work assigned to each team member, as well as a contingency plan in the absence of the Project Manager);
- **Project Understanding, Approach and Proposed Methodology:** the Proponent’s understanding of the project, the general approach to complete the Municipal Growth Management Study, (an overview of the strategy for public engagement), and a description of the methodology proposed to complete the scope of work described in Section 2.5; and
- **Detailed Work Plan:** a breakdown of tasks, resources to be dedicated to each task including the level of day to day support to the project, and key dates associated with the project deliverables.

The technical proposal may include any additional material that the Proponent considers directly related to the Project Scope of Work described in Section 2 and Proponent

Qualifications described in Section 3. If additional material is included, the Proponent should indicate clearly how the material relates to the Scope of Work and/or Proponent Qualifications.

1.9. CONTENTS OF FINANCIAL PROPOSAL

The financial proposal should be based on the Scope of Work described in Section 2 and the Project Budget described in Section 4.

At a minimum, the financial proposal must include the following information:

- a firm fixed price for the completion of the Municipal Growth Management Study;
- a schedule for completion of the project, including target dates for deliverables;
- a breakdown of costs for each phase of the project;
- a proposed payment schedule linked to the completion of the project deliverables;
- hourly and per diem rates for all team members;
- proof of the following insurance (or an indication of whether the Proponent has the ability to, at its own expense, provide and maintain the following insurance with insurers and in forms and amounts acceptable to the Communities of the West River Group):
 - Professional Liability insurance in an amount not less than \$2,000,000.00 CAD, on a claims made basis, insuring the Proponent's liability resulting from errors and omissions in the performance of professional services;
 - Commercial General Liability insurance in an amount no less than \$2,000,000.00 CAD inclusive per occurrence against bodily injury and property damages; and
 - Automobile Liability insurance on each vehicle owned, operated or licensed in the name of the Proponent in an amount not less than \$1,000,000.00 CAD.

The financial proposal may include any additional information that the Proponent considers directly related to cost associated with the Project Scope of Work described in Section 2 and the Project Budget described in Section 4. If additional information is included, the Proponent should indicate clearly how the information relates to the cost associated with the Project Scope of Work and/or Project Budget.

1.10. WITHDRAWAL OF PROPOSALS

Proponents may withdraw their proposals prior to the Submission Deadline. To withdraw a proposal, a written notice of withdrawal must be received by the RFP Contact prior to the Submission Deadline and must be signed by an authorized representative of the Proponent. The Communities of the West River Group are under no obligation to return withdrawn proposals.

1.11. PROPOSALS IRREVOCABLE AFTER SUBMISSION DEADLINE

Proposals shall be irrevocable for a period of 90 days after the Submission Deadline.

2. PROJECT SCOPE OF WORK

2.1. INTRODUCTION

There are opportunities for communities to work together to create stronger and larger municipalities with increased governance capacity – a Municipal Growth Management Study is one way to explore options. The need for a Municipal Growth Management Study has been identified by the West River Group as a result of the adoption, by the province, of the Municipal Government Act (MGA) in 2016. By evaluating growth opportunities strategically, a Municipal Growth Management Study can provide a collaborative framework for future investment and development in a region with common resources and challenges.

This study will help the Communities of the West River Group assess the ability to work together. The study will examine the individual priorities of each community and how these priorities could be included in a future larger community and provide recommendations on how to move ahead. The study will assess how a future amalgamated community might work in the best interest of the residents in each community or whether the present day communities would better serve their residents by remaining as they are. This study will assist the Group and the individual communities in establishing the most applicable municipal structure to meet the ongoing needs of the residents of the participating communities. Our goal is to maintain a rural community and the main purpose of a Municipal Growth Management Study is to identify how to best meet this objective.

The Communities of the West River Group offer varying level of services to their residents. For example, Afton owns and maintains a community centre and owns fourteen (14) acres providing guaranteed shore access on the Northumberland Strait; Bonshaw owns a community centre and supports the Bonshaw Hall. New Haven-Riverdale has implemented an Official Plan for their municipality and owns and maintains athletic fields, walking trails, a playground and park. West River owns and maintains a community park on the Northumberland shore. Meadowbank does not own or maintain any infrastructure at this time. For four (4) of the five (5) municipalities, there is no local land use planning in place and that responsibility is currently handled by the province.

Comparatively, depending on their size and infrastructure, municipalities in the rest of the province of Prince Edward Island, have assumed a variety of roles in providing local services to their residents and businesses. These services are being used by the local municipal residents and non-residents alike. However, some municipalities are increasingly being asked to assume more complex responsibilities from higher levels of government and are facing increased expectations from their residents. For example, communities are being asked to mediate on unsightly property or domestic animal complaints within their communities.

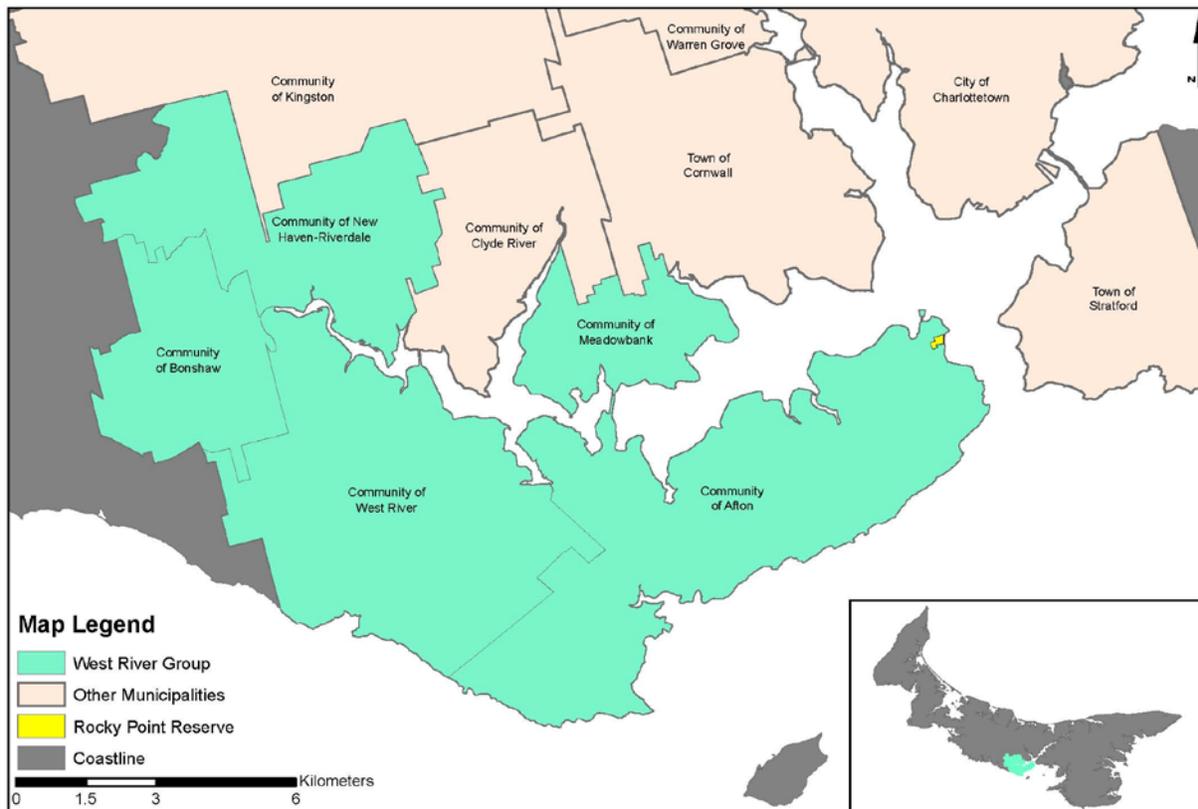
Many communities are facing challenges such as population shifts, infrastructure demands, environmental concerns, and climate change impacts. While some municipalities have adopted local planning frameworks that enable area residents to determine the vision for the future of their communities, many communities have not yet done so.

2.2. PROJECT BACKGROUND

The Communities of the West River Group are home to approximately 3,200 residents (2017 estimates) and represent a land area of 29,529 acres (11,950 hectares) along the south shore of Prince Edward Island. In comparison, the 2016 Census estimates the population of the adjoining Town of Cornwall at 5,348 residents and the population of the City of Charlottetown at 36,094 residents. The maps included further in this section provide an overview of the proximity of the Communities of the West River Group to Charlottetown and Cornwall, which represent the largest and fourth largest municipalities on Prince Edward Island in terms of population.

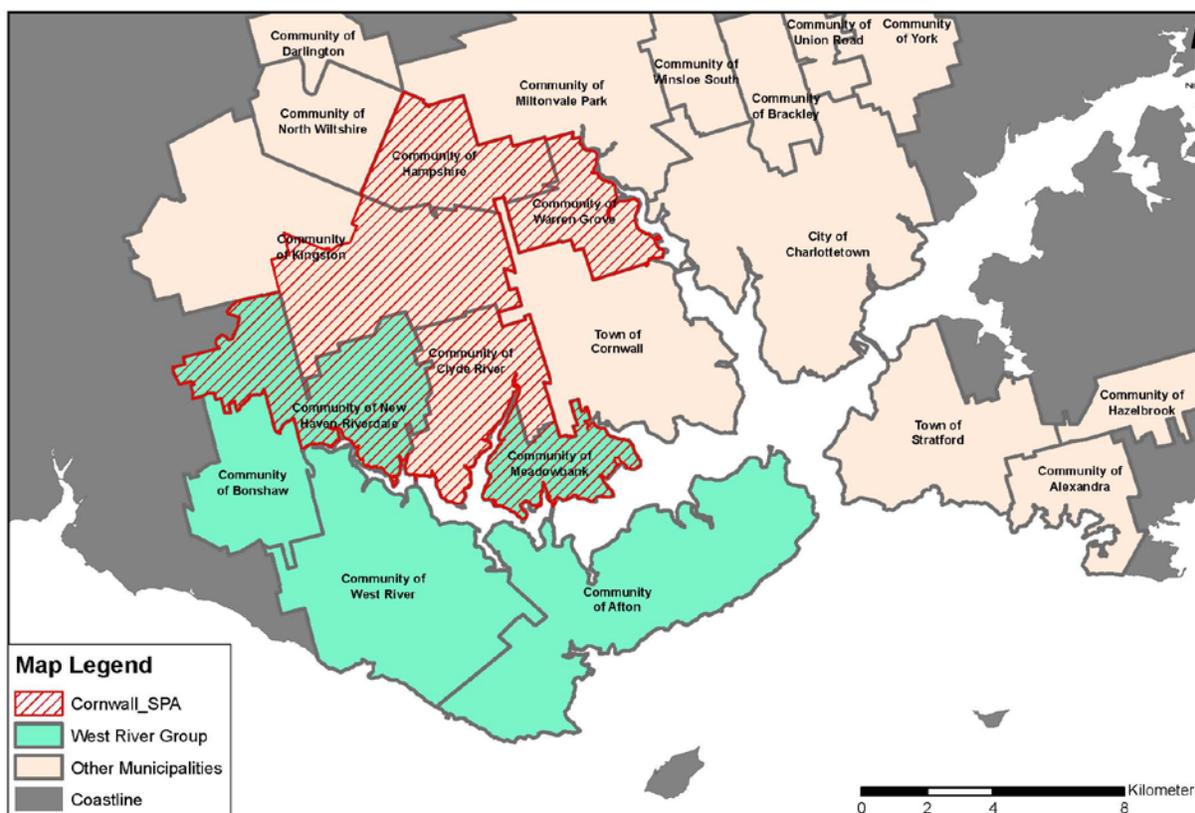
In the late 1960's the Province began to promote the formation of community organizations known as Community Improvement Committees to allow communities to collect and forward fire dues to the local fire departments. From 1974 to 1977, smaller rural, farming based communities joined together to form larger improvement committees. Of the West River Group, New Dominion, Fairview, Rocky Point, Cumberland, Nine Mile Creek and Rice Point formed Afton. New Haven, Churchill and Riverdale formed New Haven-Riverdale. Canoe Cove, Long Creek, New Argyle and St. Catherines formed West River. These new incorporated communities, as well as Bonshaw and Meadowbank, took on additional responsibilities in the form of elected councils, monthly or bi-monthly council meetings, annual financial projections and budgets, as well as annual public meetings to present budgets and reports to their residents. Rural schools in the region have been closed by the province over the past decades and the province has centralized schooling. All member municipalities of the Group purchase fire services from the North River Fire Department.

Although largely rural and still agriculturally based, the West River Group is also comprised of residents who work in Charlottetown, Cornwall and Summerside. As the province centralized services to help strengthen its cities and towns, residents of the Group travel to Charlottetown or Summerside to access most provincial services, including health services. While retail services are available within the West River Group, residents also use the centralized retail services in Cornwall, Summerside and Charlottetown. Recreationally, the residents of the West River Group access local recreational services but also use the services of the APM Centre which is jointly owned by 13 surrounding communities. Four (4) of five (5) members of the Group belong to the Communities 13 – owners of the APM Centre. There is a growing trend within the West River Group where farmland is being converted to housing development. Control of this development is currently in the hands of the province's Municipal Affairs Department with the exception of New Haven-Riverdale, the only member of the Group that has developed an Official Plan. With growing housing development and the influx of new residents, populations within the Group have not declined but as residents age, farming is either passing onto the younger generation or, as stated above, land is being removed from agriculture and used for other purposes and without any forward planning this is of particular concern when considering the importance of agriculture to the economy of PEI.



At the time of municipal amalgamation in the 1990's, Special Planning Areas were established to restrict development just outside the City of Charlottetown and the Towns of Cornwall and Stratford. Some of the communities within the Group are located in the Cornwall Region Special Planning Area. According to the Planning Act, the province introduced Special Planning Areas to minimize un-serviced residential, commercial and industrial development. These provisions in the Act were to help sustain rural communities by limiting future urban or suburban residential development, as well as non-resource commercial and industrial development, and minimize the loss of primary industry lands to non-resource land uses. The Special Planning Areas were also identified to minimize the potential for conflicts between primary agricultural/farming uses and urban residential, commercial and industrial uses. This section of the Planning Act has proved problematic for communities within the West River Group. With the benefit of hindsight, it is now clear that development has leapfrogged these Special Planning Areas, as people take advantage of lower taxation rates outside the large municipalities. Agricultural land has been taken out of production. Haphazard housing development and strip housing along rural highways is one of the results in non-Special Planning Areas and municipalities without Official Plans and planning strategies. With the implementation of the MGA, changes to the Planning Act will need to be addressed.

WEST RIVER GROUP WITHIN CORNWALL'S SPECIAL PLANNING AREAS



In December 2016, the Legislative Assembly of Prince Edward Island (PEI) passed the MGA. The MGA modernizes municipal legislation on PEI and supports capacity building for local governments. At the same time, it transfers increased responsibilities to municipalities across PEI. Not all communities feel it is necessary to either assume these increased responsibilities or make any changes and would like to maintain the status quo relationship with the province. Some communities recognize that some changes are necessary in order to shape the development within their communities. While New Haven-Riverdale has moved to enact an Official Plan, its enforcement, as well as, the implementation and enforcement of by-laws have been problematic. New Haven-Riverdale's (NHR) Official Plan ensures consistent and fair development while maintaining a rural lifestyle and active agricultural businesses (ie. farming). However, bylaw defense and legal challenges have occurred a few times over the years and these have placed NHR's limited financial resources at risk. These experiences have helped NHR to recognize that professional staff and more frequent by-law maintenance would benefit the community. The other communities within the Group have not taken on the responsibilities associated with an Official Plan such as the enactment of by-laws and defer to the province in these matters.

With the passing of the MGA, the province is implementing its vision and guidelines for the continuing sustainability of communities. The MGA requires that municipalities take on the responsibility of an all-day election process that includes the appointment of a presiding electoral officer and advance polls. The Chairperson role becomes a Mayor who is elected separately from Councilors during the election. Communities will be required to offer minimum office hours in an

accessible building and the provision of fire protection, municipal land use planning service (Official Plans and bylaws) and emergency services planning will become mandatory for all communities. The inclusion and expansion of these services will challenge the current community structures and tax base. As they are now, each community may not be able to stand alone without an unsustainable increase in municipal taxes.

At the beginning of 2017, the majority of the Island's land area remains unincorporated and falls under provincial jurisdiction. Unincorporated areas border New Haven-Riverdale, West River and Bonshaw. Some of these unincorporated areas may receive the services of the North River Fire Department and it may be to their residents' benefit to consider inclusion within the Communities of the West River Group. Provincially, there are 73 Island municipalities, including all five members of the Communities of the West River Group. These municipalities are commonly administered by part-time and volunteer staff. The populations of these municipalities have wide-ranging population numbers and land mass and are made up of cities, towns, villages and rural municipalities. Less than half of all Island municipalities presently make use of a local land use planning regime.

With the enactment of the MGA, the role of municipalities will increase in complexity. To assist municipalities in adapting to the many changing roles, Municipal Growth Management Studies are an opportunity through which the provincial government is supporting collaborative municipal efforts to identify and respond to these shared challenges. Within the Communities of the West River Group, there is a strong sense of community in each of the individual municipalities but also an acceptance of shared values and a commitment to each community's current infrastructure of community centres, parks and nature trails. There is also a shared history of interaction with the waters of the West River and the Northumberland Strait. By involving our local residents, businesses and landowners and inviting their views and input in all phases of the study, the Municipal Growth Management Study will help provide a clear timeframe and structural pathway to developing a plan for future economic success for all of the residents of the five communities while at the same time, meeting our goal of maintaining a rural community.

By working together in the Communities of the West River Group, the Group will have the opportunity to take into consideration any concerns over the possible loss of identity and the potential for increases in property tax that a possible amalgamation might bring. Under the mantle of the Communities of the West River Group, the study will also focus on cost sharing, resource allocation and shared management possibilities to meet the additional responsibilities mandated by the MGA.

2.3. PROJECT PURPOSE

A Municipal Growth Management Study provides an opportunity to study the available social, cultural, and economic resources in the Communities of the West River Group to increase capacity, optimise service delivery and promote economic opportunities. A Municipal Growth Management Study will help the Group determine the feasibility of restructuring initiatives. To do so, the Municipal Growth Management Study will identify the costs and feasibility of each community maintaining the status quo (identify the changes required for each community to maintain the status quo and still meet the requirements of the new MGA), while meeting the responsibilities covered within the MGA. It will also identify the costs and feasibility of restructuring the Communities of the West River Group into one entity. For information purposes, the study will look at other options - the benefits and disadvantages of joining a larger municipality.

The possibility of inviting residents of unincorporated areas contiguous to members of the Group municipalities and who are serviced by the North River Fire Department will be assessed during the study. Overall, the purpose of this Municipal Growth Management Study is to help the Communities of the West River Group determine and compare:

- the costs, viability, advantages and disadvantages of each community maintaining the individual current municipal structures of each community;
- the costs, viability, advantages and disadvantages of restructuring the communities into one entity comprised of the five members of the Group;
- for information purposes only, the advantages and disadvantages of any individual community joining a larger urban municipality within the same fire district; and
- identify contiguous unincorporated areas to the Group and within the North River fire district who would benefit from participation within a potential Group amalgamation.

2.4. PROJECT OVERVIEW

Using the aforesaid purposes described above, the Municipal Growth Management Study is expected to be completed through a two-phase process. Each phase will include a significant public engagement component and will result in a project report. An overview of each phase is provided below.

Phase 1 will result in an Assessment and Evaluation report that contains:

- a) an existing profile of the study area and the individual municipalities;
- b) an assessment of the study area that considers physical, demographic, economic and administrative characteristics including current community infrastructures;
- c) an identification of contiguous unincorporated areas to the individual communities within the North River fire district; and
- d) an evaluation of the feasibility of achieving future requirements for viable municipalities, including the provision of administrative, financial and land use planning functions as individual municipalities and as a larger Group.

Phase 2 will result in an Options and Recommendations report that contains:

- a) all options for municipal structuring, including phasing and transition planning; and
- b) recommendation of a preferred option for municipal restructuring, including identification of priority actions.

2.5. PROJECT TERMS OF REFERENCE

The successful Proponent will be responsible for completing a Municipal Growth Management Study through the two-phase process outlined in Section 4. At a minimum, the Municipal Growth Management Study must include:

Public Consultation:

Public consultation will be included during both phases of the study. Three mechanisms are the backbone, but not the entirety, of public consultation in this study: Public Meetings, Web-based and Individual Initiative.

1. Public Meetings

- a. minimum of four public meetings at each of three sites (to be determined);
- b. each meeting will have a clearly defined purpose, agenda, and format;
- c. each meeting will include a brief set of questions to solicit public input;
- d. each meeting will be scheduled and advertised at least 30 days in advance;
- e. and, each meeting will result in a written report to the Committee.

2. Web-Based

- a. a web site dedicated to the study will be opened in no more than 60 days from the start of the project;
- b. the site will be updated at least twice each week;
- c. the site will include two principle areas: education and public input;
- d. the site will be considered one of our best means of providing a transparent study process: every advantage of this means of communication should be taken to inform visitors of the study design and progress;
- e. the education pages will include information as provided by communities and the Committee;
- f. the input pages will allow electronic comments to be submitted at any time;
- g. and, the site host will respond to suggestions from the Committee for improvement of the site.

3. Individual Initiative

Proponents are invited to submit ideas in the proposal for:

Responding to requests for information from the public, and receiving input by phone, email, mail, and drop-boxes located in each of the five communities.

Phase 1:

1. **Preliminary meetings with the committee of The Communities of the West River Group.**
2. **A profile of the study area**, including:
 - map with existing municipal boundaries clearly defined and labelled;
 - estimated population; and
 - identification of communities of interest and areas where community collaboration currently exists (e.g. sporting clubs, family of schools, area associations, watershed groups, infrastructure providers, etc.).
 - identification of contiguous unincorporated areas to the Group belonging to the North River fire district.
3. **An assessment of the study area** that considers current and future perspectives about:

- physical geography;
- natural features;
- population trends;
- economic trends (including institutional, commercial, industrial and resource-based economic activities);
- tax assessment and rates (residential as well as non-residential);
- land use trends and development patterns;
- existing and proposed municipal budget, considering:
 - deficits;
 - debt ratios;
 - tax revenues;
 - expenditures;
- existing municipal assets and liabilities, including capital (physical) assets within the study area including legacy properties; and
- details about current and proposed municipal services, including, but not limited to:
 - professional municipal administration;
 - emergency planning;
 - land use planning;
 - financial services and auditing;
 - recreation services and programs ie. athletic fields, walking trails, playgrounds, parks;
 - community services and programs ie. Community centres, performance spaces;
 - economic development initiatives; and
 - other programs and services (ie the river program as applicable).

4. **An evaluation of the feasibility of meeting future requirements for viable municipalities as per the *Municipal Government Act*, including:**

- municipal office accessible to the public on a weekly basis (a minimum of 20 hours per week);
- professional administration;
- land use planning;
- emergency planning;
- development of bylaws;
- increased frequency of council meetings (minimum 6 per year);
- all-day elections;
- open government;
- financial accountability; and
- asset management plans.

5. **A public engagement strategy** that includes creative and novel solutions to the following three mechanisms as outlined above: Public Meetings, Web-based and Individual Initiative.

Phase 2

6. **Options for municipal restructuring** (including considerations for phasing and transition planning).
7. **Recommendation of a preferred option for municipal restructuring** (including immediate, medium-term and long-term actions, such as strategies for ongoing public engagement upon completion of the Municipal Growth Management Study).
8. **A public engagement strategy** that includes creative and novel solutions to the following three mechanisms as outlined above: Public Meetings, Web-based and Individual Initiative.
9. **A final project presentation** at one multi-community meeting – location to be decided at a later date.

2.6. PROJECT DELIVERABLES

- Phase 1 draft report: Assessment and Evaluation (1 electronic and 10 hard copies)
- Phase 1 final report: Assessment and Evaluation (1 electronic and up to 100 hard copies)
- Phase 2 draft report: Options and Recommendation (1 electronic and up to 10 hard copies)
- Phase 2 final report: Options and Recommendation (1 electronic and up to 100 hard copies)
- Project presentations: 1 electronic and up to 100 hard copies of presentations made during the Study.

Proponents should note that the number of hard copies required for presentations and final reports is to allow ease of access for municipal representatives and the public to review information as it becomes available through the two-phase study.

3. PROPONENT QUALIFICATIONS

The scope of work outlined in Section 2 typically requires the expertise of various specialists. The Proponent must have the multi-disciplinary knowledge and experience necessary to complete this project.

Collaborative proposals are encouraged, and previous experience with municipal projects on Prince Edward Island is preferred. Partnerships must identify a lead consulting firm and sub-contractors.

At a minimum, the Proponent must have the following qualifications:

- A project manager with a minimum of 5 (and preferably 10) years of experience in leading growth management studies and providing restructuring advisory to municipalities;
- significant experience in designing, leading and facilitating public engagement processes;
- knowledge and awareness of municipal financial and administrative systems;
- qualifications and expertise in municipal finance;
- qualifications and expertise in demographic and economic analysis;
- qualifications and expertise in land use planning;
- experience and expertise in options analysis;
- experience in phasing and implementation of large-scale projects;
- familiarity with municipal governance and processes on Prince Edward Island;

- a working knowledge of the Municipal Government Act 2016 (MGA), the Planning Act and Special Planning Areas in Prince Edward Island;
- familiarity with agricultural land use and the challenges of rural development;
- experience in project coordination and management;
- ongoing support; and
- *exceptional communication skills.*

4. PROJECT BUDGET

The total project budget for the Municipal Growth Management Study is \$60,000 inclusive of all expenses, disbursements and taxes. All Proponents must clearly identify and itemize the costs of the conducting and preparing the Study such as time to prepare the study, travel and other expenses.

5. PROPOSAL EVALUATION AND NOTIFICATION OF RESULTS

5.1. EVALUATION OF PROPOSALS

The Communities of the West River Group will evaluate each proposal on the basis of the rated criteria listed below:

- **Project Team and Qualifications:** a description and history of the services offered by the Proponent, a description of each team member's qualifications and experience, and the resumes of each team member proposed to be involved in the Municipal Growth Management Study on behalf of the Proponent (15 points);
- **Experience and References:** a description of similar projects undertaken by the Proponent and contact information (email and telephone) for a reference for each listed project (15 points);
- **Team Organization:** identification of the Project Manager, identification of the role of all team members included in the Project Team (including the years of experience and the work assigned to each team member), as well as a contingency plan in the absence of the Project Manager (20 points);
- **Project Understanding, Approach and Methodology:** the Proponent's understanding of the project, the general approach to complete the Municipal Growth Management Study (including an overview of the strategy for public engagement), and a description of the methodology proposed to complete the scope of work outlined in Section 2.5 (25 points); and
- **Detailed Work Plan:** a breakdown of tasks, resources to be dedicated to each task including the level of day to day support to the project, and key dates associated with the project deliverables specified in Section 2.6 (15 points).
- **Price:** (10 points).

Technical proposals will be evaluated before financial proposals are opened. Only Technical Proposals that score a minimum of 65 points will be considered and evaluated further on price.

The qualifying Proponent with the highest combined Technical and Financial score will be selected to enter into an agreement with the Communities of the West River Group. Upon finalization of the agreement with the West River Group, this Proponent shall be known as the successful Proponent.

5.2. NOTIFICATION TO SELECTED PROPONENT

The Communities of the West River Group will notify the selected Proponent in writing. The tentative timeframe for notification is November 2017.

5.3. NOTIFICATION TO OTHER PROPONENTS

Once an agreement is finalized and executed between the Communities of the West River Group and the successful Proponent, notification of the outcome of the procurement process will be posted on the Prince Edward Island Tendering Site.

5.4. PROPONENT DEBRIEFING

Proponents may request a debriefing after notification of the outcome of the procurement process. All requests must be in writing to the RFP Contact and must be made within sixty (60) days of notification of the outcome of the procurement process. The intent of a debriefing is to aid the Proponent in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process or its outcome.

6. TERMS AND CONDITIONS

1. The Communities of the West River Group reserve the right to:
 - reject any or all proposals;
 - cancel this RFP process without liability at any time prior to the execution of a written agreement between the Communities of the West River Group and a Proponent. The Communities of the West River Group may, in their sole discretion, issue a new RFP for the same or similar scope of work;
 - amend this RFP process without liability at any time prior to the execution of a written agreement between the Communities of the West River Group and a Proponent;
 - verify with any Proponent or with a third party any information set out in a proposal;
 - check references other than those provided by any Proponent;
 - disqualify any Proponent whose proposal contains misrepresentations or any other inaccurate or misleading information;
 - disqualify any Proponent or the proposal of any Proponent who has engaged in conduct prohibited by this RFP;
 - waive minor formalities in proposals received;
 - request written clarification in relation to a Proponent's proposal; and
 - make public the names of any or all Proponents.These reserved rights are in addition to any other rights that may be implied in the circumstances, or that the Communities of the West River Group have by law.

2. All of the provisions of this RFP are deemed to be accepted by each Proponent and incorporated into each Proponent's proposal.
3. Proponents are solely responsible for all costs incurred in the preparation and submission of a proposal, and any related costs, in response to this RFP, including any subsequent negotiations with the Communities of the West River Group, if any. The Communities of the West River Group will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the response, loss of anticipated profit in connection with any final contract, or any other matter whatsoever.
4. The Communities of the West River Group will not return the proposal or any accompanying documentation submitted by a Proponent.
5. The Communities of the West River Group make no guarantee of the value or volume of work to be assigned to the successful Proponent. The agreement to be negotiated with the selected Proponent may not be an exclusive contract for the provision of the described Scope of Work. The Communities of the West River Group may contract with others for services the same as, or similar, to the Scope of Work.
6. Proponents may be required to be registered to carry on business in accordance with applicable laws. The status of a Proponent's business registration does not preclude the submission of a proposal in response to this RFP. A proposal can be accepted for evaluation, regardless of (i) whether the company is registered, or (ii) whether its business registration is in good standing. However, if the Proponent is selected as the successful Proponent, that Proponent must bring itself into compliance prior to the execution of the Agreement. For information on the business registration requirements of the Consumer, Corporate and Financial Services, Department of Justice and Public Safety, please consult:

<http://www.gov.pe.ca/jps/index.php3?number=1027199&lang=E>
7. If a selected Proponent fails to execute an agreement or satisfy any other applicable conditions within fifteen (15) days of notice of selection, the Communities of the West River Group may, without incurring any liability, withdraw the selection of that Proponent and proceed with the selection of another Proponent or cancel the RFP Process.
8. The Communities of the West River Group may disqualify a Proponent for any conduct, situation or circumstance, determined by the Communities of the West River Group to constitute a conflict of interest.
9. The Communities of the West River Group may disqualify a Proponent who has engaged in lobbying or other illegal or unethical conduct that may be seen to compromise the competitive process provided for in this RFP.
10. Any documentation, files or material (electronic or hard copy) supplied to the Communities of the West River Group by the successful Proponent will remain the property of the Group and will be returned on completion of the contract. The work produced under this contract shall be the property of the Communities of the West River Group and may not be used for any other purpose without the written authorization of the West River Group.

11. The Communities of the West River Group reserve the right to cancel an agreement executed with a selected Proponent pursuant to this RFP at any time with appropriate compensation for authorized work completed up to the date of notice.
12. These terms and conditions are non-exhaustive and shall not be construed as intending to limit the pre-existing rights of the Communities of the West River Group and any Proponent to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations.
13. These terms and conditions are to be governed by and construed in accordance with the laws of the Province of Prince Edward Island and the federal laws of Canada therein.