

**The Corporation of the Municipality of St.-Charles
Community Strategic Plan**

REQUEST FOR PROPOSAL

RFP 2024-6

Sealed proposals clearly marked “The Corporation of the Municipality of St.-Charles Community Strategic Plan” will be received by

Denis Turcot, CAO
2 King Street East
St Charles Ontario
P0M 2W0

or electronically via email to tenders@stcharlesontario.ca

until 2:00 pm, local time, on Monday September 9, 2024.

Inquiries regarding this project should be directed to Denis Turcot, Chief Administrative Officer, at 705-867-2032 ext. 206 or cao@stcharlesontario.ca.

Lowest or any proposal not necessarily accepted.

Please note that any bid exceeding the budget will not be considered for this tender.

Budget

Consultant	\$50,000
Consultant Travel	\$5,000
Event Marketing and promotion	\$5,000

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Section 1 – General Provisions

1.1 – Proposal Opening

Submissions received, by the date and time of closing, will be opened by respective members of the Municipality of St.-Charles following the closing date and time during a public opening process.

1.2 – Submissions

Sealed proposals clearly marked “Municipality of St.-Charles Community Strategic Plan” will be received by:

Denis Turcot, CAO
Municipality of St.-Charles
2 King Street East
St. Charles, Ontario
P0M 2W0

OR electronically via email to tenders@stcharlesontario.ca

Until **2:00 p.m.** local time on **Monday September 9, 2024**

1.3 – Right to Accept or Reject Proposals

The Municipality reserves the right to reject any or all proposals and the highest scoring or any proposal will not necessarily be accepted.

The Municipality reserves the right to accept any proposal that is considered best for the interests of the Municipality.

The Municipality shall not be responsible for any liabilities, cost, expenses, loss or damage incurred, sustained or suffered by any Proponent by reason of the acceptance or non-acceptance, by the Municipality, of any proposal or by reason of any delay in the acceptance of a proposal save as provided in the contract.

No proposal shall be accepted from any person or corporation who, or which, has a claim or has instituted a legal proceeding against the Municipality or against whom the Municipality has a claim or has instituted a legal proceeding with respect to any previous contract, without the prior approval of council.

The Proponent acknowledges and agrees that nothing contained herein, in the proposal documents or elsewhere, no act done or expense incurred by it in the preparation and submission of this proposal, no trade or industry custom or practice, and no representation or assurance that may have been made or given to it by or on behalf of the Municipality, shall in any manner legally bind the Municipality, in any circumstances, to accept this proposal, the lowest proposal, only a proposal submitted in compliance with the requirements of the RFP documents, or any proposal at all. The Proponent further acknowledges and agrees that the Municipality shall have complete and unrestricted liberty in this regard and may reject any or all proposals or may accept any proposal in whatever manner, at whatever proposal price, on whatever terms and for whatever reasons as the Municipality, in its absolute discretion, considers to be in its own best interests, all without liability or obligation of any kind to the Proponent. Without limiting the generality of the foregoing, the Municipality reserves the right to accept a proposal from a Proponent that has submitted a proposal that does not comply with all of the requirements of this RFP and to negotiate

changes to the final agreement, even when such changes do not comply with the requirements of the RFP.

1.4 – Proposal Acceptance Period

It is understood that in submitting a proposal, each Proponent agrees that its proposal may be subject to acceptance up to ninety (90) working days after closing date for the proposal.

1.5 – Submitted Proposal to be Considered an Offer

The submission of a proposal to the Municipality shall be deemed to constitute an “Offer” which may be accepted, at the option of the Municipality. Upon such acceptance the terms, conditions and specifications herein set forth shall be confirmed and binding upon the Municipality and the Proponent. Upon acceptance of the proposal, both parties hereto agree to do everything necessary to ensure that the terms of this agreement take effect.

1.6 – Clarification or Interpretation

Proponents submitting a proposal shall satisfy themselves by personal examination and, by such means as they prefer, as to the actual conditions, requirements and extent of the work required to complete the assignment.

It is understood and acknowledged that while this RFP outlines a scope of work and includes specific requirements, Proponents 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. Items not herein specified, but required to complete the project, shall be provided as if specified. Any misinterpretation of requirements within this RFP shall not relieve the Proponent of the responsibility of providing the services aforesaid.

1.7 – Proponents Obligation to Investigate

Proponents submitting a proposal shall satisfy themselves by personal examination of the site and, by such means as they prefer, as to the actual conditions, requirements and extent of the work required to complete the assignment.

It is understood and acknowledged that while this RFP outlines a scope of work and includes specific requirements, Proponents 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. Items not herein specified, but required to complete the project, shall be provided as if specified. Any misinterpretation of requirements within this RFP shall not relieve the Proponent of the responsibility of providing the services aforesaid.

While the Municipality has made every effort to ensure the accuracy of the information provided in this RFP and otherwise to the Proponent, the Proponent shall not make any claim against the Municipality for damages or extra work caused or occasioned by the Proponent relying upon such records, reports, or information whether as a whole or in part, furnished by the Municipality, private company or individual.

1.8 – Questions/Clarifications

To help ensure uniformity, questions / clarifications, discrepancies, omissions and/or interpretations which may arise during the bid period are to be submitted through the Chief Administrative Officer no later than **August 30, 2024**. Answers to these questions / clarifications will be forwarded to all registered Proponents in the form of an addendum.

The Municipality reserves the right to not address questions received after the specified deadline has passed. Should any discrepancy or omission go unreported to the designated official during the tendering period, the proper interpretation shall be at the discretion of the Municipality.

The Municipality will not be responsible for any oral interpretations or verbal instructions, as to the meaning of any part of the document and any such interpretations or verbal instructions shall not be effective to modify any of the provisions of this document.

1.9 – Addendum/Addenda

Any amendments, new information, or clarifications to this RFP will be posted prior to the closing date and shall be considered part of the RFP documents. The Municipality makes no promise or guarantees that addenda's will be delivered by any means to any Proponent nor is the Municipality responsible for computer malfunctions or delays; therefore, it is the Proponent's sole responsibility to check with the Municipality's CAO for any addenda prior to the bid closing date and time.

No addenda will be issued after August 30, 2024, except to extend or cancel the RFP.

The Municipality encourages Proponents not to submit their bid until the question period is over in case an addendum is issued. If a Proponent submits their bid prior to this, or at any time prior to the bid closing, and an addendum is issued by the Municipality, the Proponent may withdraw their bid submission. The Proponent is solely responsible to:

- make any required adjustments to their proposal; and
- acknowledge the addendum/addenda; and
- ensure the resubmitted proposal is received by the Municipality no later than the proposal closing date and time.

1.10 – Withdrawal of Proposal

Proponents may edit or withdraw their proposal prior to the closing time and date. However, the Proponent is solely responsible to ensure the resubmitted bid is received by the CAO no later than the stated closing time and date.

The withdrawal of a Proposal does not disqualify a Proponent from submitting another Proposal prior to the closing time.

1.11 - Ability and Experience of Respondent

The Corporation of the Municipality of St.-Charles will not award this contract to any Respondent who does not furnish satisfactory evidence of possessing the ability and experience in this class of work and sufficient capital and equipment/manpower to ensure acceptable performance and completion of the Proposal. Any proposal will be considered non-compliant if reference checks or past experience is deemed unsatisfactory, in the opinion of the Municipality of St.-Charles.

1.12 – Conflict of Interest

The Proponent is required to submit a conflict-of-interest declaration of any potential conflict of interest or perceived conflict of interest with their proposal. This may be submitted in the form of a letter. Failure by a Proponent to declare any potential conflict of interest or to obtain a waiver of any such conflict shall be grounds for the Municipality to disqualify a proposal or terminate any Contract formed without liability and for cause.

1.13 – Lobbying

In order to ensure fairness to all Proponents, the Municipality shall endeavor to prevent unfair advantage created by lobbying. Therefore, the Municipality reserves the right to disqualify, at any time and at its sole discretion, any Proponent engaging in lobbying in connection with a competitive process between a date that is no later than the date of issue of the document and the date of signing of a contract between the Municipality and the successful proponent. The Municipality may disqualify a proponent at any time in the procurement process, including after the selection process has been completed.

Lobbying may include any activity that the Municipality, in its sole discretion, determines has or may give an unfair advantage to one Proponent relative to other Proponents. Without limiting the foregoing, lobbying may include:

- a) Verbal or written approaches to any Municipality staff other than those identified as contacts in the procurement document; or

b) Verbal or written approaches to any member of Municipality Council.

1.14 – Designated Official/Communication

The designated official for the RFP is Denis Turcot, Chief Administrative Officer. All inquiries regarding this RFP should be submitted through the Chief Administrative Officer.

1.15 – Proposal Submission

Care should be exercised in reading and completing all bid submission requirements as failure to comply with such may disqualify your bid submission.

1.16 – Timelines

The Proponent will not be permitted to start work on this project until after all required documentation has been received and an Executed Agreement has been issued.

The Project is to be completed by **March 28, 2025**. Proposals should include a schedule for the project, including key dates for meetings, deliverables and input required from all stakeholders.

1.17 – Contract Term

The period of the contract will be as laid out in the work plan submitted by the Respondent. Further review, including requesting additional information from St. Charles, could extend the timeframe for the contract services beyond the initial forecasted contract term. The work plan should demonstrate the ability to complete the project within the March 2025 timeframe.

Section 2 – General Terms and Conditions

2.1 – Workplace Safety and Insurance Board (WSIB)

The Service Provider certifies that it is in full compliance with the Workplace Safety and Insurance Act. A copy of the Clearance Certificate must be submitted by the successful Service Provider upon notification of the award and prior to commencing work. Updated Clearance Certificates should be provided during the course of the contract.

2.2 – Insurance Requirements

The selected Service Provider shall provide the Municipality with proof of insurance as follows: minimum of \$2,000,000 for general liability and minimum of \$2,000,000 for professional errors and omissions liability. The Service Provider agrees to indemnify and save harmless the Municipality from all suits and action for damages and costs to which they may be put by reason of injury to persons or property resulting from negligence, carelessness, or any other cause whatsoever in the performance of the work.

Change in Coverage

It is understood and agreed that the coverage provided by these policies will not be changed or amended in any way, nor cancelled by the Service Provider until sixty (60) days after written notice of such change or cancellations has been personally delivered to the Municipality.

Prior to the commencement of work, the Service Provider shall forward a Certificate of Insurance evidencing this insurance with the executed Agreement. The Certificate shall state that coverage will not be suspended, voided, cancelled, reduced in coverage or in limits except after thirty (30) days (ten (10) days if cancellation is due to non-payment of premium) prior written notice by registered mail to the Municipality.

It is also understood and agreed that in the event of a claim any deductible or self-insured retention under these policies of insurance shall be the sole responsibility of the Service Provider and that this coverage

shall preclude subrogation claims against the Municipality and any other person insured under the policy and be primary insurance in response to claims. Any insurance or self-insurance maintained by the Municipality and any other person insured under the policy shall be considered excess of the Service Provider's insurance and shall not contribute with it. The minimum amount of insurance required herein shall not modify, waive or otherwise alter the Service Provider's obligation to fully indemnify the Municipality under this Agreement.

The Municipality reserves the right to modify the insurance requirements as deemed suitable.

2.3 – Accessibility for Ontarians with Disabilities Act, 2005 (AODA)

Under the Accessibility for Ontarians with Disabilities Act, 2005, as may be amended from time to time, the Service Provider providing the services contemplated herein shall ensure that every person in relation to this contract, who deals with members of the public or other third parties on behalf of the Municipality, or provides goods, services, or facilities on behalf of the Municipality, has received all training required by Section 6 of Ontario Regulation 429/07, Accessibility Standards for Customer Service, and Section 7 of Ontario Regulation 191/11, Integrated Accessibility Standards.

2.4 – Approvals

Prior to the commencement of the work, the Service Provider is responsible for determining and obtaining the necessary approvals, permits and licences required by all applicable legislation and regulations pertaining to the nature of the work. Copies of all such approvals, permits and licences must be provided to the Municipality, upon request, prior to commencement of the work.

2.5 – Advertising

No advertising or other rights will form part of this contract.

2.6 – Laws and Regulations

The Service Provider is assumed to have made themselves familiar with and will abide by all Federal, Provincial, Municipal and Local laws, rules and regulations which in any way affect the work, and no plea of misunderstanding will be considered on account of ignorance thereof. If the Service Provider shall discover any provisions in the specifications or contract that are contrary to or inconsistent with any law, rule or regulation, it shall at once report it to the Municipality's Representative, in writing.

2.7 – Payments and Pricing

All pricing shall be inclusive of all travel, training, disbursements, etc., as no additional charges will be accepted by the Municipality. All unit prices tendered for this requirement shall be in Canadian funds, H.S.T. extra where applicable.

2.8 – Change Orders

Change Orders must be approved in advance, in writing, by the Chief Administrative Officer.

2.9 – Consultants Insolvency

The Agreement may be terminated at the Municipality's option, effective upon written notice to the Service Provider in the event that the Service Provider files for bankruptcy, becomes insolvent, makes an assignment for the benefit of creditors, or has a receiver appointed, or any proceeding is demanded for, by or against the Service Provider under any provision of the Bankruptcy and Insolvency Act, as amended or any applicable Provincial Law.

2.10 – Assignment

Neither this Proposal nor the right to receive payment hereunder may be assigned or transferred without the prior express written consent of the Municipality and any attempted assignment shall be void and of no force or effect against the Municipality.

2.11 – Subcontractors

The Service Provider shall not, without the written consent of the Municipality's Representative, make any assignment or sub-contract for the provision of any goods or services hereby proposed.

2.12 – Termination

Subject to the provisions below, the Contract may be terminated by the Municipality upon thirty (30) days advance written notice to the Service Provider; if any work or service hereunder is in progress, and not completed as of the date of termination, then the Contract may be extended upon written approval of the Municipality until said work or services are completed and accepted.

a) **Termination for Convenience** – The Municipality may terminate this Contract for convenience at any time in which case the parties shall negotiate reasonable termination costs.

b) **Termination for Cause** – In the event of Termination for Cause, the thirty (30) days advance notice is waived, and the Service Provider shall not be entitled to termination costs.

c) **Termination Due to Unavailability of Funds in Succeeding Fiscal Years** – If funds are not appropriated or otherwise made available to support continuation of the performance of this Contract in a subsequent fiscal year, then the Contract shall be cancelled and, to the extent permitted by law, the Service Provider shall be reimbursed for the reasonable value of any non-recurring costs incurred but not amortized in the price of the supplies or services delivered under the Contract.

2.13 – Contractual Disputes

The Service Provider shall give written notice to the Chief Administrative Officer of intent to file a claim for money or other relief within ten (10) calendar days of the occurrence giving rise to the claim or at the beginning of the work upon which the claim is to be based, whichever is earlier.

The written claim shall be submitted to the Treasurer no later than sixty (60) days after final payment. All disputes related to this Contract shall be resolved as follows:

- a) A meeting between the Vendor and the Chief Administrative Officer; if the dispute is not resolved then,
- b) The decision can be appealed to the Chief Administrative Officer; if the dispute is still not resolved then,
- c) The decision can be appealed to the Municipality Council.

2.14 – Severability

In the event that any provision shall be judged or decreed to be invalid, such ruling shall not invalidate the entire Agreement but shall pertain only to the provision in question and the remaining provisions shall continue to be valid, binding and in full force and effect.

2.15 – Counterparts

This Agreement and any amendment or other document related to the Agreement may be executed in counterparts, each of which will constitute an original, and all of which will constitute one agreement.

2.16 – Photographic, Facsimile and Electronic Signatures and Electronic Delivery

Each party agrees that a photographic or facsimile copy of a signature evidencing a party's execution of this Agreement, or any amendment or other document related to the Agreement, will have the same force and effect as a manual signature. This Agreement and any amendment or other document related to the Agreement may be signed electronically. Each Party agrees that electronic signatures, whether digital or encrypted, of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures. Electronic signature means any symbol, or process attached to or logically associated with a record and executed and adopted by a party with the intent to sign such record. Delivery of an executed copy of this Agreement or any amendment or other document related to the Agreement, by facsimile or electronic transmission constitutes valid and effective delivery.

2.17 – Allocation of Risk

The Municipality shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Proponent by reason of non-acceptance by the Municipality of any Proposal submission or by reason of any delay in its acceptance.

2.18 – Errors and Omissions

The Municipality shall not be held liable for any errors or omissions in any part of this RFP. The information contained in this RFP is supplied as a guideline for Proponents and is not necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve the Proponents from forming their own opinions and conclusions.

2.19 – Municipal Freedom of Information and Protection of Privacy Act

All correspondence, documentation and information provided to the Municipality, including the submissions of proposals, shall become the property of the Municipality. As such, these items are subject to the Municipal Freedom of Information and Protection of Privacy Act and may be subject to release pursuant to the Act. Proponents are reminded to identify in their proposal any specific, scientific, technical, commercial, proprietary, or similar confidential information, for which disclosure could cause them injury. Complete proposals are **not** to be identified as confidential.

Section 3 – Terms of Reference

3.1 – Purpose

The Municipality is seeking proposals from competent and qualified vendors to complete a Community Strategic Plan. The purpose of a Community Strategic Plan is to establish a shared vision and priorities for the future development and improvement of a community. The plan will define the priorities for the Community over the next ten years that will set us on a path to achieving this vision, including setting longer term goals which stretch beyond the current term of Council.

The anticipated measurable economic benefits are:

Increased Efficiency: An outcome of the plan is matching the municipal facilities to community demand. This efficiency can lead to cost savings in various municipal operations. Right sizing Facilities for planned strategic direction.

Improved Infrastructure: A well-defined strategic plan can prioritize infrastructure projects essential for economic development, such as roads, utilities, and public facilities. Better infrastructure attracts businesses, residents, and investors, thereby boosting economic activity. e.g which roads to upgrade.

Attracting Investment: A clear strategic plan communicates the municipality's vision and potential for growth, making it more attractive to investors and businesses seeking stable environments for investment. This can lead to increased capital investment and job creation.

Tourism Development: Outline initiatives to promote tourism, preserve natural resources, and enhance recreational facilities. This can result in increased visitor spending and revenue generation for local businesses.

Enhanced Quality of Life: Improving quality of life factors such as public safety, education, healthcare, and recreational opportunities can attract and retain residents. With many cities facing housing shortage, possible increase in residential development will be enhanced with direction.

Revenue Diversification: By identifying new revenue streams and economic opportunities, a strategic plan can help diversify the municipality's revenue base. This reduces reliance on a single source of income (such as property taxes) and enhances fiscal sustainability.

Workforce Development: Investing in workforce development programs and education initiatives outlined in the strategic plan can create a skilled labor force attractive to businesses. With the anticipated new subdivision, the impact on available local workforce may impact new business development.

From The above, the measurable outcomes are:

of new housing (Short to mid-term)

of new businesses (long term)

improved efficiency and usefulness of municipal facilities,

of users

\$ cost savings

\$ increase municipal and business revenue.

3.2 - Background and Planning Context

The last Strategic plan was completed in 2013 and was set for 5 years (2014 to 2019). We will be over 10 years once this plan is finalized.

The significant changes that have being observed and thus forming our rationale to update our strategic plan are:

- The best farmlands are being purchased by a few large land holders, the requirement of acres of land to be cost effective has increased to over 500 acres. The remaining farmland is smaller and not as efficient, there is some new economic activity, especially since the pandemic, where smaller farm plots are diversifying into more of a niche market, specialty crops or farm tourism. e.g. from walking a llama, petting a goat to berry picking.

- Cost of rural land has significantly increased where the interest in creating new lots is now profitable for current landowners.

- Other than the Enbridge LNG plant, the Municipality does not have industrial or any other significant large scale size commercial operation. The tax base is mostly dependent on residential property taxes.

The critical events that have and are expected to occur in the next few years that did not exist in 2013 during the last strategic plan are:

- Broadband Internet: Fiber Internet is now a reality within the town and soon to rural areas of the Municipality.

- Natural Gas expansion is on course and construction is expected to start in 2025 to bring natural gas to the village area of St Charles opening potential for industry.

- Land for housing continues to be available at a lower cost than surrounding major cities. A subdivision of 24 lots is expected to start construction in 2024. Four new homes and a new road have been built.

- A second developer is actively looking into a further 25 lot development and a small industrial park which the availability of natural gas is key. Whether this moves forward is at the developer's discretion, but the interest and discussion lead us to believe that there is much more potential for development for both housing and for business especially for those that may require Natural Gas and / or high-speed internet.

- When this pending development of the subdivision is completed, this will increase the number of homes within the town limits up to 25% which will significantly impact our municipality from increased traffic to business opportunities.

3.3 - Scope

The Council of the Municipality of St.-Charles is looking for an innovative, priority-oriented Community Strategic Plan that addresses both internal organizational capacities, review of existing service levels across all departments, and considers external challenges and opportunities.

The purpose of the Municipality of St.-Charles Community Strategic Plan RFP is to develop a community and organizational strategy that includes a long-term vision and values, together with medium term objectives and priorities and shorter-term action plans. The Municipality understands that there are a variety of perspectives, models, and approaches that can be used to develop a strategic planning document. The selected proponent, therefore, should be able to determine which model or model(s) would be best suited to meet the needs of the Municipality, enabling the Municipality to complete its organizational goals.

The 2025-2030 Community Strategic Plan will be a guiding framework as the Municipality navigates a period of transformational change. It will focus on economic, employment and community development directions. These directions are intended to help improve the quality of life for Municipality of St.-Charles residents, as well as position the Municipality on all aspects of community development. This plan should support growth, including reflecting the needs and expectations of the growing community, fiscal responsibility, and a clear path to achieving goals identified within it. The plan must focus on identifying high- and mid-level priorities to address challenges identified in existing reports, studies, and documents provided by staff as well as new research and consultation conducted as part of this strategic planning process. It must include input contributed through Council, staff, and community stakeholder consultations, as well as key values and guiding principles to assist direction and decision making, and recommended implementation actions to achieve strategic vision and goals, along with potential timelines for implementation.

Proponents are requested to provide detailed information on options for community and staff consultation as part of their proposal. Previous strategic and other plan materials will be provided to the proponent as background information. The Strategic Plan should include methods (including strategy and specific actions, with first steps) to accomplish the goals of the Municipality. The plan should also include actions to enhance the success of the long-term strategies. This will enable the Municipality to experience and report quick successes. The Strategic Plan should include a summary of critical issues facing the Municipality in its effort to meet the goals set forth in the plan, as well as available resources that can be utilized. Each Proponent, by submitting a Proposal, represents that the Proponent has read, completely understands, and accepts the terms and conditions of this RFP in full and agrees that should its Proposal be successful, the Proponent will enter into a service contract with the Municipality of St.-Charles.

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

The Municipality of St.-Charles reserves the right to control all aspects of the Strategic Planning process. The Proponent shall not conduct surveys or meetings with staff or other persons without receiving prior approval from the Municipality. Proponents are requested to provide detailed information on options for community and staff consultation, including the approach to consultation, and the associated cost and the timeframe involved. Proponents are further requested to recommend the most effective and efficient method of engaging stakeholders in the community strategic planning process. As part of the deliverables, it is anticipated that the proponent will prepare a communication/consultation strategy which will form the basis of the consultation process for the project. This would be for both the internal and external aspects of the project. The communication strategy shall identify the best means of communicating with the public and target groups.

The above scope work may be adjusted by the Municipality as appropriate to achieve a strategic plan that meets the vision of residents, organizations, funding agencies, and Council. The Strategic Plan is a living document and should undergo periodic review and adjustments to reflect progress toward achievement of goals. For this reason, flexibility should be an important aspect of the Plan.

A final report of the Strategic Plan document should include a consolidation of the work completed, including the reasoning for all decisions and recommendations. The Proponent will be required to submit a draft Community Strategic Plan for review and may be required to make changes to the submitted draft following review. The plan, inclusive of any required changes, will become the final and published plan. This document and any supporting documents should be produced in both paper and digital formats.

3.4 - Qualifications of the Proponent

The proponent or consulting team shall demonstrate:

- i) A knowledge and understanding of the community strategic planning process and development of municipal strategic plans
- ii) Expertise and capacity to perform the necessary public consultations with a variety of demographics and communities;
- iii) Experience working with local governments preferably in Northeastern Ontario
- iv) Demonstrated ability to conduct research, write strategic plans and deliver the plans on time and on budget.

The Municipality reserves the right to investigate and evaluate the experience, capability, registration and financial position of any Proponent or consulting team prior to an award of the contract. The Municipality reserves the right to reject any proposal based on the information obtained.

Review Committee:

The CAO will determine the Municipality administration staff who will form part of the review committee and review submissions. The CAO will prepare a recommendation report to Council with respect to the approval of the successful Proponent and award the contract.

3.5 – Process/Deliverables/Work Plan

The proponent will be responsible for providing expert advice throughout the project, and the deliverables below. The Municipality encourages modification of these general steps by the proponent to achieve a more enhanced, efficient and/or effective outcome.

- Develop a work/action plan to achieve the mandate of the RFP. Project Coordination, including regular meetings and status reports to keep the project on schedule and keep identified stakeholders apprised of the process.
- Orientation/training of the participants to the process and components of community strategic planning. Reference the other Plans and studies to provide a solid framework for the community strategic plan.
- Community and Employee Input, including gathering of stakeholder information and input as well as using appropriate methods of communication and engagement. 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 (Clubs/Organizations/Not-for-Profits, and other Government agencies).
- Research and review the Municipality's resource information - existing plans and documents pertinent to the comprehensive community strategic plan.
- 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.
- Planning, coordinating, and taking minutes of all meetings, including community/employee consultation sessions and meetings with Council and Staff. This can be in conjunction with assigned Municipal staff.
- Organize and facilitate public meetings to disseminate and gather information relevant to the process.

- Strategic Plan documentation, including development of an interim and final report for the project, including executive summary.

3.6 – Proposal Submission

Prices/bids must include all incidental costs, and the Respondent must be satisfied as to the full requirements of the RFP. No claims for extra work will be entertained and any additional works must be authorized in writing prior to commencement. Should the Proponent require more information or clarification on any point, it must be obtained in writing prior to the submission of the proposal. Submissions shall include, but not be limited to, the following information.

- i) Contact information, including the business or individual's full name, complete address, telephone number, contact person's full name and email address
- ii) A brief description of the firm – its clients, history, projects and staff
- iii) An outline of the services provided (Work Plan)
- iv) An outline of experience in similar projects
- v) A minimum of three (3) references, including a contact name and phone number
- vi) Any other supporting information you may wish to include with your submission

Failure to complete the information as required may result in the submission not being considered. Point by point response is requested. Proponent shall address each and every required item as indicated above.

3.7 – Closing Date and Time

Sealed proposals clearly marked "Municipality of St.-Charles Community Strategic Plan" will be received by:

Denis Turcot, CAO
Municipality of St.-Charles
2 King Street East
St. Charles, Ontario
P0M 2W0

Or by email to tenders@stcharlesontario.ca

Until **2:00 p.m.** local time on **Monday September 9, 2024**

Late proposal submissions shall not be accepted by the Municipality.

3.8 – Value Added

The respondent should identify if it can offer additional value-added services beyond the scope of the services outlined above which would further aid the Municipality in Community Strategic Planning.

Section 4 – Respondent Selection Procedure

Proposals will be assessed on the basis of information provided by the Respondent at the time of submission as well as any additional information provided during subsequent meetings with the Respondent if required.

4.1 - Evaluation Criteria

Proposals will be assessed against the following criteria. The Municipality reserves the right to shortlist firms for further evaluation and interviews which may alter the final scoring results. Proposals will be scored based on meeting or exceeding the expectations of the established evaluation criteria.

Evaluation Criteria	Weight
Understanding of Municipal Government Sector; especially the challenges/opportunities of the Municipality of St.-Charles; most appropriate methodologies and schedules to achieve project goals.	25
Experience on Similar Projects and Past Performance; demonstrated experience and ability to complete a project of this scope, related experience and successful completion of similar projects, ability to meet deliverables and timelines, references of previous projects.	20
Complete, Comprehensive, Creative and Clear Proposal; Completeness (covers all areas outlined) and quality of proposal, creative/innovative (solutions for Municipality vs. Generic), comprehensive (covers all tasks/aspects in sufficient detail); clear, logical and easy to follow presentation and compliance with the requirements of the RFP.	20
Timelines; Schedule for the completed work, decision-making points and responsibilities of the municipality, specifically referencing the proposed timing of the public consultation process.	10
Proposed Fee; Cost effectiveness and the best overall team.	10
Project Manager, Study Team & Disciplines; Leadership, management, communication and presentation skills and qualifications of project manager, qualifications/skills of multi- disciplinary team) appropriate skills sets devoted to tasks.	15
Total	100