



Request for Proposals

For the Municipality of the County of Inverness Strategic Plan

Terms of Reference

Proposals are invited for the provision of consulting services for the Municipality of the County of Inverness in accordance with the following Terms of Reference.

Submissions must be received by July 7th, 2017 at 12:01 pm.

Submissions can be, mailed, faxed, or e-mailed (PDF format) to the attention of
Joe O'Connor, Chief Administrative Officer.

Municipality of the County of Inverness
375 Main Street
PO Box 179
Port Hood, NS B0E 2W0

Fax: (902) 787-3110
E-mail: joe.oconnor@invernesscounty.ca

Please confirm by e-mail that you have received this Request for Proposals.

1. General
 - 1.1. The purpose of the Terms of Reference is to outline the services required of the Consultant in relation to the preparation of the Strategic Plan for the Municipality of the County of Inverness.
 - 1.2. The purpose of the Terms of Reference is to outline the services required of the Consultant in relation to the preparation of the Strategic Plan for the Municipality of the County of Inverness
 - 1.3. This will be a contract to establish strategic priorities and participate in an evaluation after one year.
 - 1.4. Consultant is defined as an individual, a firm or a combination of individuals and firms with demonstrated expertise with strategic planning and facilitation of large groups.
 - 1.5. The CAO / Clerk will be the owner's Project Manager and key contact for this contract.
 - 1.6. The Contract will be between the Consultant and the Municipality of the County of Inverness.

2. Scope of Work
 - 2.1. To lead a municipal strategic planning process that develops a four-year implemental municipal strategic plan/framework; provide training, tools/ templates that will facilitate ongoing planning, collaboration and responsive management to align and integrate strategic initiatives.
 - Reviewing the Municipality's present Vision/Mission and Strategic initiatives
 - Scan the important issues in and across the County
 - Orienting the Municipality to a clear sense of mission
 - Defining clear priorities

External relations

 - Maintaining supportive intergovernmental relations
 - Engaging with citizens, groups and other external stakeholders
 - Fostering public support through enhanced communication

Improving decision making

 - Develop general strategic areas for planning
 - More facilitative processes to understand issues and opportunities
 - Supporting more integrated planning, prioritizing and investment
 - 2.2. Background Information for Review: Studies and reports have been developed over the past 10 years and can be provided upon request.
 - 2.3. Area of Consideration: The project area will include mainly the Municipality of the County of Inverness, but may also include some activities corresponding to neighbouring Municipalities and other levels of government or agencies.

3. Statement of Consulting Work
 - 3.1. The duties of the Consultant include
 - Initial meeting with committee to discuss project.
 - Review all relevant background information.

- Develop a format of seeking input from Council, management and staff for direction in development of the project plan.
- Scheduling of meetings
- Host meeting(s) with Council, management and staff separately to identify issues and ideas for consideration.
- Format notes and information received to bring forward in collective planning session.
- Facilitate collective planning session
- Compile a draft strategic plan for Council's comments.
- Meet with Council and Administration to develop an implementation plan
- Present the draft final plan to Council at an open meeting of Council.

3.2. Meetings: Include in the proposal allowance for the following:

- Meetings with municipal staff and Council to seek input and feedback.
- A 1-2 day meeting with Council, CAO and department staff to facilitate the drafting of the strategic plan.
- Meeting to review and finalize draft
- Meeting with Council and Administration to discuss an implementation plan including timelines, staff responsibilities and means to measure success.
- A year end meeting with Council, Administration and Staff to review milestones, outcomes and gaps.

3.3. Project duration: the consultant shall provide a schedule of the project completion to the Municipality of the County of Inverness.

3.4. Proposed Outcome: A complete, four-year Council Strategic Plan outlining the vision of the 2017 -2021 Municipality of the County of Inverness with yearly targets specific to stated goals.

3.5. Completed Plan Format: Please provide the document electronically in Microsoft Word and pdf versions. There is no requirement for the document to be printed in paper format by the Consultant. The document will become the property of the Municipality of the County of Inverness.

4. Consulting Contract Agreement

4.1. The municipality, in its sole discretion, reserves the following rights:

- to reject any or all responses, proposals or information received pursuant to this RFP;
- to cancel this RFP with or without the substitution of another RFP;
- to issue additional requests for information or for proposals; d) to take any action affecting the RFP, the RFP process or the services or facilities subject to this RFP that would be in the

- best interests of the Municipality;
- to consider any alternative approach or proposal that meets the basic needs of the Municipality;
- to require one or more Proponents to supplement, clarify or provide additional information in order for the Municipality to evaluate any proposal submitted;
- to waive any defect or technicality in any proposal received;
- the Municipality is under no obligation to confirm whether any Proponent's submissions are complete or to request a Proponent to provide additional detail or clarification of any material provided pursuant to this RFP process; and
- to negotiate with the successful Consultant, the final terms and conditions of the draft Services Agreement.

4.2. The general responsibilities of the Consultant shall be:

- To agree to enter into a Fixed Fee Contract between the Municipality of the County of Inverness and the Consultant for the work as outlined in these Terms of Reference for the fixed fee amount and estimated disbursements amount as submitted by the Consultant as part of their proposal;
- To provide complete and comprehensive professional services in the specialty field required to carry out the work;
- To carry out the work in accordance with an accepted schedule presented by the Consultant with his/her proposal and to submit monthly reports describing progress and indicating milestones completed; and
- To make use of existing plans, reports and records to the maximum extent practicable.

4.3. Adequate Information

- The Consultant acknowledges he/she has had adequate discussions and access to sufficient information to enable him/her to undertake the services contracted for within the time limits stipulated for the project.

4.4. Changes to the Terms of Reference

- If requested in writing by the CAO, the Consultant will make any required changes in the Contract as able. The Consultant will advise the CAO of any effects on the time schedule and budget or any other implications of the changes. Such changes will be incorporated into the Contract by formal Change Order. No changes required by the Consultant to remedy errors or other problems attributable to shortcomings of the Consultant, including persons employed or supervised by him/her, shall entitle him/her to an additional fee.

4.5. Invoicing Instructions

- The Consultant shall submit an invoice to the CAO in an agreed upon process to be outlined in the proposal or absent of that on a monthly basis. It is requested that the Consultant provides a bi-weekly progress report through email. Please include a summary of the services provided during the invoice period, accompany each invoice. This will facilitate expedient processing.

4.6. Payments

- Payments by the Municipality of the County of Inverness shall be based on the consultant's submission for fees and expenses, supported by invoices for actual expenses incurred.

5. Proposal Submission

The Consultant's proposal shall contain the following information:

- A detailed description of the methodology to be followed in achieving the purpose of this study and performing the duties outlined herein, including time schedules for work in each phase including a statement of the Consultant's understanding of the scope of this assignment.
- A description of the Consultants' study team leader and other team members, including name, qualifications and each member's particular experience relevant to this assignment.
- A description of the related experience of team members as well as a list of client references.
- A schedule of fees and expenses, including the rates of remuneration for individual team members and the estimated amount of time each member will devote to the project; including a cost breakdown by study component.
- Examples of other similar studies.
- The Consultant maybe be required to present their proposal to the Committee.
- Provide references upon request.

6. Evaluation Process

The evaluation process will be carried out by the Advisory Committee based on the information received in the following areas:

- Proponent Information
- Proposal
- Timelines (preference that study should take no more than 2 months)
- Experience conducting Strategic Plans

The Advisory Committee, at its option, may take further factors into account as it deems necessary to make a decision in its overall best interest.

7. DEADLINE

Deadline for submissions is July 7th, 2017 at 12:01 pm Municipality of the County of Inverness, P.O. Box 179, Port Hood, Nova Scotia, B0E 2W0.