

REQUEST FOR PROPOSAL

Mumford Transit Terminal - Replacement Opportunities Assessment Study

RFP #17-030

Closing: March 3, 2017 at 2:00 pm local time.

Halifax Regional Municipality
Customer Service Centre, 1st floor Alderney Gate
40 Alderney Drive
Dartmouth Nova Scotia
B2Y 2N5

February, 2017

NOTICE

REQUEST FOR PROPOSAL #17-030

Halifax Transit is interested to determine the future site location and requirements in accommodating existing and projected operational demands at the Mumford Transit Terminal. The Halifax Regional Municipality (“the Municipality”) is seeking proposals from qualified individuals/ firms to a) identify the minimum site requirements and best practices; b) identify and evaluate candidate sites; and c) a functional design and the provision of Class D cost estimates. The new facility will require a footprint that is significantly larger than the existing terminal and will feature improved passenger amenities. It will serve as a base for expanded transit service in the Halifax Peninsula/Mainland North area and a transfer hub for a number of routes to and from the Regional Centre. Work should commence as of April 1, 2017 and be completed by March 31, 2018.

Sealed Proposals, *One (1) in digital format on usb flash drive* and one (1) unbound and duly signed for RFP#17-030 Mumford Transit Terminal – Replacement Opportunities Assessment Study, Halifax Regional Municipality, Halifax, Nova Scotia shall be delivered to:

Procurement Section,
Halifax Regional Municipality
c/o Customer Service Centre, 1st floor Alderney Gate
40 Alderney Drive
Dartmouth Nova Scotia
B2Y 2N5

Proponents are advised that Canada Post and its' affiliates do not deliver to the Procurement Office.

All questions concerning the procurement process shall be directed to *Karen Rundle*, Senior Procurement Consultant by E-mail to **Rundlek@halifax.ca**

The Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever in its opinion best serves the interest of the Municipality.

Jane Pryor, Manager
Procurement

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SECTION 1. INSTRUCTIONS TO PROPONENTS

1. General Instructions

This Request for Proposal (“RFP”) document and any addenda may be obtained in person from, the Procurement Section, Halifax Regional Municipality, c/o Customer Service Centre, 1st floor Alderney Gate, 40 Alderney Drive, Dartmouth Nova Scotia, B2Y 2N5, or via download at <http://www.novascotia.ca/tenders/tenders/ns-tenders.aspx>

- a. All proposals are to be submitted in accordance with this RFP document.
- b. All proposals are to be submitted in sealed, plainly marked envelopes. Proposals sent by facsimile or e-mail will not be accepted.
- c. Additional information or clarifications of any of the instructions or information contained herein may be obtained from the Halifax Procurement Office.
- d. Any proponent finding any discrepancy in or omission from this RFP, in doubt as to the meaning of any provision(s) herein, or feeling that the RFP is discriminatory, shall notify the Halifax Procurement Office in writing within five (5) days of the scheduled opening of proposals. Inquiries and exceptions taken by proponents in no way obligate the Municipality to change the RFP; however, any interpretations given by the Halifax Procurement Office and any changes made to the RFP will be reflected in addenda duly issued by the Halifax Procurement Office.
- e. The Municipality will assume no responsibility or liability for oral instructions or suggestions. All official correspondence in regard to the RFP should be directed to the Halifax Procurement Office.
- f. All proposals must be signed by an authorized signatory of the proponent.
- g. The Municipality reserves the right to make additional copies of all or part of each proponent’s proposal for internal use or for any other purpose required by law.
- h. Proposals may be publicly acknowledged but cost proposals will NOT be publicly opened. Proponents will be advised of the results after an evaluation of all proposals has been completed and a successful proponent has been determined.

2. Eligibility

- a. Prospective proponents are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of the Municipality, give rise to conflict of interest in connection with this RFP or the Services. Proponents are to submit with their proposal documents a description of any issue that may constitute a conflict of interest violation for review by the Municipality. The Municipality’s decision on this matter will be final.
- b. HRM may, in its absolute discretion, reject a Proposal submitted by a Proponent if:
 - i) the Proponent, or any officer or director of the Proponent;
 - ii) any related company of the Proponent through common ownership, control or otherwise; or
 - iii) any intended sub-contractor of the Proponentis or has been engaged, either directly or indirectly through another corporation, in a legal action (including arbitration or the service on HRM of formal notice of intent to commence a legal action) against HRM, its elected or appointed officers and employees in relation to:
 - i) any other contract with HRM; or
 - ii) any matter arising from HRM’s exercise of its powers, duties, or functions under the Halifax Regional Municipality Charter or another enactmentwithin five years of the date of this Request for Proposals.

In determining whether to reject a proposal under this clause, HRM will consider whether the litigation is likely to affect the Proponent’s ability to work with HRM, its consultants and representatives and whether HRM’s experience with the Proponent (or any of the individuals or entities referenced above) indicates that HRM is likely to incur increased staff and legal costs in the administration of this contract if it is awarded to the Proponent.

3. Proponent's Qualifications

- a. No contract will be awarded except to responsible proponents capable of providing the Services.
- b. No contract will be awarded to any proponent who is currently disqualified from bidding (or to a proponent whose owner/principal is or was the owner/principal of a vendor who is disqualified from bidding) on the scope of services outlined in this RFP per Administrative Order #35, Procurement Policy, Section 11 – Vendor Performance.
- c. Proponents must be primarily engaged in providing the Services as outlined in this RFP.
- d. Proponents must have an extremely comprehensive understanding of the subject matter in this RFP. Such understanding and previous experience in all aspects of similar projects are essential criteria in the qualifying process. The Municipality reserves the right to consider past performance on Municipal contracts in the evaluation of a proponent's qualifications.
- e. Proponents must have a proven record of having provided similar services. The Municipality reserves the right to check all client contacts furnished and to consider the responses received in evaluating proposals.
- f. Proponents must use personnel and management knowledgeable in their areas of expertise. The Municipality reserves the right to perform investigations as may be deemed necessary to ensure that competent persons will be used in the performance of the Services.

4. Reservations

The Municipality reserves the right to reject or accept any or all proposals or parts of proposals, when in its reasoned judgment; the public interest will be served thereby. The Municipality may waive formalities or technicalities in proposals as the interest of the Municipality may require. The Municipality may waive or correct minor errors, omissions and inconsistencies in proposals provided they do not violate the proposal intent.

Under no circumstances shall the Municipality be liable for any losses or damages arising from the Municipality's rejection or acceptance of any proposal for any reason whatsoever. Notwithstanding the foregoing, the Municipality's liability for any losses or damages resulting from the Municipality's failure to fulfill any of its explicit or implied obligations under the RFP, including the Municipality's acceptance of a non-compliant proposal, or the Municipality's awarding of a contract to a non-compliant proponent shall in all circumstances be limited to the lesser of actual damages suffered or \$1,000.00

5. Proponents Expenses

Proponents are solely responsible for their own expenses in preparing, delivering or presenting a proposal.

6. Exceptions

The submission of a proposal shall be considered an agreement to all the terms and conditions provided herein. Any proposal containing exceptions to the terms and conditions of the RFP or the resulting contract may be rejected by the Municipality for non-compliance. Any request for changes to the terms and conditions of the RFP or the resulting contract must be made in writing to the Halifax Procurement Office prior to the date of closing. Only if the Municipality issues a formal addendum to the RFP will any changes to the RFP or resulting contract be effective.

7. RFP Administration

All questions concerning the procurement process shall be directed to *Karen Rundle*, Senior Procurement Consultant, by E-mail to Rundlek@Halifax.ca

8. Existing Conditions

Each proponent must completely satisfy themselves as to the exact nature and existing conditions of the requirements and for the extent and quality of the Services to be performed. Failure to do so will not relieve the successful proponent of their obligation to perform the Services in accordance with the provisions of the contract.

9. Questions

- a. The proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open. Questions should be directed in writing to the contacts identified in this document. **Email is the preferred method of contact.** Verbal questions and responses that are not later confirmed in writing will not be considered an official response.
- b. Questions and responses that are deemed to materially affect the RFP requirements, project scope, time lines, etc. or to be of interest to all prospective proponents **may** be made available via Addenda at the sole discretion of the Municipality.

10. Addenda

- a. Any addenda issued by the Municipality shall be posted on the Nova Scotia Public Tenders website at <http://novascotia.ca/tenders/tenders/ns-tenders.aspx>.
- b. The proponent must monitor the Nova Scotia Public Tenders Website for any addenda that may be issued during the full open period of the RFP.
- c. The submission of a proposal shall be deemed to indicate that the proponent has read, understood and considered all addenda posted to the Nova Scotia Public Tenders Website prior to the closing date and time.

11. Currency and Taxes

Prices are to be quoted in Canadian dollars, inclusive of duty (where applicable) and exclusive of HST.

12. Public Information/Proprietary Information

- a. The Municipality is subject to the Freedom of Information and Protection of Privacy provisions contained within the *Municipal Government Act* at Part XX. Any document submitted to the Municipality in response to this RFP is subject to this legislation and proponents should be aware that any member of the public is entitled to request a copy of the document. In response to such a request, the Municipality may be required to disclose some or all of the information in accordance with the criteria set out in the legislation, including sections 462, 480 and 481(1).
- b. The Municipality is also subject to the *Personal Information International Disclosure Protection Act*. The Act creates obligations for the Municipality and its service providers when personal information is collected, used or disclosed. Requirements include limiting storage, access and disclosure of personal information to Canada, except as necessary or otherwise required by law.
- c. By submitting a proposal, the proponent agrees that the Municipality may disclose the following sections of the proposal without notification to the proponent:
 1. Form of Proposal
 2. Executive Summary
 3. Proponent's fixed total cost (if applicable)

13. Period of Submission Validity

Unless otherwise specified, all proposals submitted shall be irrevocable for ninety (90) calendar days following the closing date.

14. Surety

Bid Surety, Performance Surety and/or Labour and Materials Surety may be required in relation to this RFP and the resulting Contract.

15. Disputes

In cases of dispute as to whether or not an item or service proposed meets the RFP requirements, the decision of the Municipality shall be final and binding.

16. Disqualification for Inappropriate Contact

Any attempt on the part of a proponent or any of its employees, agent, contractors or representatives to contact any of the following persons with respect to this RFP or the Services prior to contract award may lead to disqualification:

1. any member of the evaluation team (except those mentioned in this RFP) or any expert advisor to them;
2. any member of Council; and
3. any other member of the Municipal staff.

17. Proposal Submission

- a. The submission of a proposal will be considered as a representation that the proponent has carefully investigated all conditions which may affect or may, at some future date, affect the proponent's performance of the Services as described in this RFP and that the proponent is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; also, that the proponent is familiar with and will abide by all Federal and Provincial laws and regulations and all by-laws, codes and ordinances of the Municipality which in any way affect the performance of the Services or persons engaged or employed in the performance of the Services.

SECTION 2: SCOPE OF WORK

1. Project Background

Halifax Transit's fixed route transit network has grown over the last several years and currently carries over 19 million passengers annually. This network has a focal point design with strategically located terminals throughout the service area to maximize transfer opportunities for passengers. Growth of the network has increased the number of buses and passengers utilizing each terminal, creating capacity issues that have required expanding several terminals over the past few years. The Bridge Terminal (2012) in Dartmouth and Lacewood Terminal (2015) in Clayton Park are the most recent examples of Halifax Transit's and Regional Council's response to public transit growth in the Municipality.

The new facility will require a footprint that is significantly larger than the existing terminal and will feature improved passenger amenities. It will serve as a base for expanded transit service in the Halifax Peninsula/Mainland North area as described in the *Moving Forward Together Plan*, and will also serve as a transfer hub for a number of routes to and from the Regional Centre.

Located in the Halifax Shopping Centre complex between 7000 and 7010 Mumford Road, the existing Mumford Transit Terminal is the third busiest terminal in the Municipality hosting approximately 9300 visits per day. It is presently deficient in passenger amenities, accessibility, and overall capacity and does not meet the current or future needs of transit passengers or operations.

The following is insight and data to reveal the existing conditions and the challenges toward sustaining a major transit terminal in this location:

- The site of the existing Mumford Terminal is essentially 100% developed with 80% impermeable surfaces and has a 4.5 metre grade change from northwest to southeast. The challenge is that there is no room for right sizing/expansion or to achieve Halifax Transit's universal accessibility goals.
- The majority of the terminal sits on the privately held 7010 Mumford Road.
- The built form consists of a hybrid central island design utilizing the Mumford Road right of way and also leased space owned by the Halifax Shopping Centre.
- Single bus travel lanes on either side are used both for boarding/alighting passengers and travel lanes for the buses entering/exiting the terminal. It also provides limited layover space.
- The concrete platform is narrow and also serves as a sidewalk for Mumford Road.
- There is a small and under-utilized indoor passenger waiting area at the south-east end of the platform.
- During peak service times and with longer articulated buses, space limitations result in buses backing up into the mall and street right of way.
- Buses access the terminal via the shared shopping centre driveways and the Mumford Road southeast bound travel lane. These driveways and travel lanes are also used by shopping mall customers, motorists dropping-off/pick-up transit passengers, transit Park & Ride users, and pedestrians walking to the terminal and the shopping mall.
- Buses entering the southeast end of terminal do so directly from Mumford Road. Buses exiting the terminal to the northwest exit directly onto Mumford Road and have a short bus lane/queue jump.
- Busway/Platform Capacity: 2 buses NE side and 7 buses SW side
- Daily Boardings/Alightings: approximately 9000
- Approximately 8600 people live within a 1 kilometre radius of the site.
- Active transportation barriers exist in accessing this site due to the CN Rail Corridor, lack of walkway/block cuts between streets, the Halifax Shopping Centre surface parking lots and driveways, and challenging intersections to navigate on foot.

2. Goal

The goal is to determine the site requirements to accommodate existing and projected operational demands at the West End Terminal, and identify the site which both meets these demands and provides a high level of customer service.

The Guiding Principles of this project are as follows:

- To plan, design, and build to meet current and future operational growth.
- Design to provide universal accessibility.
- To elevate the quality of the public transit experience by providing improved customer environment.
- To make the facility a community asset.
- To ensure facility is located in an optimal location that is practical, efficient, and operationally feasible.

3. Objectives/Critical Path

The following design objectives should be adhered to:

- To ensure facility is planned and designed for the safety of all users.
- To utilize transit design excellence.
- To apply a human scale design approach.
- To apply civic scale material and quality.
- To integrate into the surrounding neighbourhood.
- To integrate with adjacent AT network.
- To create an attractive and universally accessible facility.
- To consider a 50-year lifecycle.
- To apply responsiveness to contextual, local and future conditions (i.e. adjacent development, potential for BRT or commuter rail).
- To accommodate emergency preparedness measures for events such as power outages.

4. Constraints

- Timeline: The work associated with this project must be completed to the satisfaction of HRM by March 31, 2018.
- Site selection: Candidate sites must be selected from within the area as defined by HRM in the kick off meeting with the successful proponent.

5. Assumptions

The following are some of the key assumptions:

- Continued growth in transit service as per rates identified in the *Moving Forward Together Plan* roll out and beyond;
- Study will be un-biased, accurate, complete and incorporate best practice in transit terminal design; and
- Only one round of public consultation will be required

6. Project Framework

For a detailed discussion of consulting services, please see section 7 below.

As part of this project, Halifax Transit staff will provide the successful proponent with projected bus & ridership volumes as well as any required operational information. The work of the successful proponent will be guided by the Halifax Transit project manager and informed by the project's HRM Technical Committee.

7. Detailed Scope of Consulting Services

This project will identify a recommended site to accommodate the new larger terminal and provide a high level functional design of the selected site and cost D estimates. As a minimum, it is expected that the consultant will provide at least one round of public consultation (two meetings and online engagement).

The Municipality requires consulting services along the following themes:

- Planning
- Transportation/Transit Planning
- Public Engagement
- Engineering
- Active Transportation
- Urban Design/Landscape Architecture

The scope of work that the Proponent will be required to undertake include, but is not limited to, the following tasks:

Stage 1: Identifying Minimum Site Requirements and Best Practices

Determine minimum site requirements to accommodate operational requirements including number of bus bays, square footage of platform, interior and exterior waiting space, and operator lobby. This stage will identify both minimum requirements and those recommended by international best practice for intermodal transit terminals.

It is anticipated that stage 1 will provide a detailed Transit Program needs assessment complete with Stakeholder and Customer interviews.

Elements to be evaluated are to include but are not limited to:

- Passenger circulation to and from the site (pedestrians, cyclists, kiss & ride, park & ride other)
- Passenger circulation transferring to another bus
- Passenger waiting indoor
- Passenger waiting outdoor
- Transit vehicle circulation within the terminal (revenue and non-revenue)
- Fleet fuel sources (electric recharge)
- Transit staff vehicle storage (parking)
- Staff access to the terminal
- Layover space
- Security surveillance
- Passenger vehicle storage (parking)
- Transit vehicle access/egress to the surrounding road network
- Opportunities to provide operator facilities (washrooms, lounge)
- Ease of bus access/egress, including the impact on route travel times, travel distances, etc.,
- Any other issue that the consultant feels is relevant.

Stage 2: Identifying & Evaluating Candidate Sites

Using the criteria established in stage 1, the consultant shall identify a minimum of five candidate sites within the study area to be agreed upon by Halifax Transit. One of the sites to be evaluated is the existing location of the Mumford Terminal on Mumford Road.

The sites will be evaluated through a number of lenses including – but not limited to – consistency with principles of Transit Oriented Design, impact on operational efficiency, land acquisition requirements, operational capacity, capacity to accommodate future growth and integration with the AT network.

Candidate sites will be evaluated and considered through both stakeholder (internal and external) and public consultation. The consultant shall assume a minimum of one round of consultation shall be included within the scope of work (i.e. a minimum of two public meetings and online engagement). At the end of stage 2, the preferred site shall be selected.

Public consultation would ideally happen this stage.

Stage 3: Functional Design and Class D Cost Estimates

Based on the preferred site identified in stage 2, the consultant shall develop a functional design of the proposed terminal showing massing and movement through the site for operations and passengers, and will include modelling where appropriate to ensure the safe manoeuvrability of Halifax Transit vehicles (i.e. auto turn). Class D cost estimates and recommended construction phasing will also be generated and presented in a final report to Halifax Transit staff.

Work should commence as of April 1, 2017 and be completed by March 31, 2018.

8. Project Management

- a. The contractor shall designate in their proposal, a project manager. All coordination for services with the Municipality and the contractor shall be the responsibility of the project manager. The project manager shall ensure that any substitutions in proponent team personnel are approved by the Municipality's project manager.
- b. Report to the Municipality through a review process and meetings at various stages of the work program. The work progress shall be measured against a defined budget and work schedule.
- c. The Municipality recognizes that project management is an essential part of this project, therefore a written biweekly progress report is required to be submitted and consist of the actual schedule achieved overlaid on the original base schedule submitted by the proponent at the start up meeting. For instances where the schedule has not been achieved a brief written explanation as to why shall be included. The progress report can be submitted either as a hard copy or as an attachment to an electronic e-mail.
- d. Meet; liaise with regulatory bodies, utilities, stakeholder groups, other levels of government, and members of the community, as required.
- e. Provide copies to the Municipality of all correspondence related to the project including agreements reached on behalf of the Municipality.
- f. The Proponent shall be prepared to provide the following:

9. Reporting and Deliverables

- a. Reports, drawings, and calculations shall be in metric units. Reports and drawings shall be stamped by a Professional Landscape Architect and by a Professional Engineer registered to practice in Nova Scotia. Drawings shall be to a scale appropriate to the design depiction and shall comply with the Municipality's standards.
- b. Electronic copies of all information (reports, drawings, and calculations; e.g., spreadsheets, computer model data files, etc.) shall be provided to the Municipality on a USB flash drive. All reports are to be provided electronically, each as a single PDF file that includes the report text and all figures, diagrams, and drawings presented. In addition, drawings shall be provided in AutoCAD Current Version format and reports shall be provided in Word format.
- c. The proponent shall provide a label for the project flash drives with the following information:

Headline: Project Drive

Title: Mumford Transit Terminal – Replacement Opportunities Assessment Study
RFP Ref: 17-030
Date:
Proponent:

- d. *All material produced and information collected by the proponent in performance of this terms of reference shall become the property of the Municipality. All material shall be kept confidential by the Proponent unless authorized in writing by the Municipality.*
- e. *Where included in the scope of work, cost estimates are required and are to exclude HST.*

SECTION 3 - SUBMISSION REQUIREMENTS

The submission of a proposal on this service will be considered as a representation that the proponent has carefully investigated all conditions which may affect or may, at some future date, affect the performance of the services covered by the proposal, the entire area to be services as described in the attached specifications and other contract documents and that the proponent is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; also, that the proponent is familiar with all Federal and Provincial laws, all codes and ordinances of the Municipality which in any way affects the prosecution of the work or persons engaged or employed in the work.

In responding to this proposal, each proponent shall, include, as a minimum, a Business/Technical Proposal and a Cost Proposal. The proposal is not complete unless it contains a Business/Technical Proposal which addresses the requirements described herein, and a separate Cost Proposal that details all costs for the proposed services. Both the Business/Technical Proposal, which shall be identified as envelope #1, and the separate Cost Proposal, which shall be identified as envelope #2, shall be submitted simultaneously. Both Technical and Cost Proposal must be signed by an authorized representative of the firm submitting.

Sealed Proposals will be received by Procurement Section, Halifax Regional Municipality, c/o Customer Service Centre, 1st floor Alderney Gate
40 Alderney Drive, Dartmouth Nova Scotia, B2Y 2N5

The Business/Technical Proposal shall be evaluated in step 1. No details of costs or rates are to be included in this part of the Proposal.

- a) **The Business/Technical Proposal shall include the Form of Proposal and a transmittal letter.**
- b) Proposals are limited to 25 pages, excluding forms, schedule, person-hours matrix, transmittal letter, addendums and appendices. A page is defined as a single-sided sheet of 8.5" by 11" paper. The only exceptions to this will be the project schedules, flowcharts and/or person-hours matrix, which may be submitted on 11" by 17" paper.
- c) Elaborate brochures or voluminous examples are neither required nor desired.
- d) Two (2) copies, One (1) unbound and duly signed and one (1) in digital format on flash drive of each proposal both technical and price components are to be submitted. Technical and price components must be submitted in separate envelopes and as separate digital files on separated drives.
- e) No project data sheets or company brochures are to be submitted. Resumes may be referred to in an appendix.
- f) Digital copies of the Proposal must not be larger than 10Mb.
- g) Proposals are to be typed using a font size no smaller than 11 pt. (with the exception of footnotes and endnotes) and using a portrait page layout. Column format is not to be used.
- h) Costs must not be included in the technical proposal.
- i) In the case of a joint venture or for sub-contractors, commitment letters shall be appended in the Proposal. Letters of commitment from member firms on their own letterhead and signed by an officer of

the company affirming their commitment to this assignment and their role. Substitutions, deletions or altering of roles of key personnel will not be allowed without written authorization from the Municipality.

1. Business Technical Solution Submission Requirements

Submissions should include, but not necessarily be limited to, the following:

- a) Evaluation Criteria #1 – Communication Skills: The proposal should be clear and readable. Information should be easy to find and should be in the order presented hereunder.
- b) Evaluation Criteria #2 – Team Composition and Experience
 - Sector Specific Experience: The proposal should clearly state the proponent firms overall experience in the field of expertise required by the scope of work. The Proposal shall include at least three (3) examples of recent projects as well as three (3) letters of reference or relevant client contact information. Proponents must be able to demonstrate that the firm has an in depth knowledge of the scope of this assignment. The purpose of this information is to demonstrate the Proponent's experience and ability to complete similar projects, develop creative solutions, resolve complex issues and communicate effectively with various parties and audiences.
 - Experience of Project Lead with projects of similar scope and size: The Proposal shall include a summary of the relevant experience as it relates to their role in this assignment. A brief description (years in business, services provided, number of employees, etc.). Additionally, the Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable.
 - Key Team Members appropriate skills and education: The Proposal shall include, as appendices a CV detailing their experience, skills and education in relation to this assignment.
 - Demonstrated history of proposed Team: The Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable. Additionally, the Proposal shall demonstrate the history of the member firms and individuals successfully delivering assignments of similar size and scope as a team.
 - Balance of level of effort: The proponent shall provide a proposed schedule to complete the tasks in the proposed work plan as well as a person-hours matrix (WBS) *without fees* outlining the hours each team member has allocated to each of the tasks in the proposed work plan. No hourly rates, dollar figures or costs shall be shown on this person/hours matrix breakdown; inclusion of any pricing information may result in disqualification of your Proposal.
- c) Evaluation Criteria #3 – Understanding of the Municipality's Needs
 - Understanding of the Requirements of the Scope of Work: Proponents shall provide a demonstrated understanding of the subject matter, including, but not limited to, the scope of work as well as the approach that will be taken to accomplish the Services related to this RFP document, as well as an indication of possible challenges and solutions not directly referenced in the Request of Proposals.
 - Acceptable Proposed Schedule and Work-plan: Proponents shall provide a work plan with which clearly outlines milestones and timelines to demonstrate how the work will progress to the desired completion date. Proponents must present a realistic timeline of the proposed Project schedule. The schedule shall reflect the tasks in the work plan and will be updated on a monthly basis to reflect project progress and shall be submitted to the Municipality's Project Lead with the contractor's status report.

- Value added propositions and recommendations: Proponents shall demonstrate an innovative approach to the completion of the assignment, utilizing all potential resources available to them.
- Attention to Relevant Challenges: Proponents shall describe and attempt to address any challenges to the assignment which they have identified but may not be spoken to in the Request.

d) Evaluation Criteria #4 – Business/Technical Solution

This criterion is evaluated based on a global view of the proposal and further analyses the entire proposal in relation to achieving a complete and comprehensive solution from the Successful Proponent.

- Business/Technical Solution: The proposal must address all of the business aspects of the engagement as identified in the RFP.
- Methodology: The proposal must combine proven project methodology and include innovative approaches and ideas in the delivery of the project. Proponents should keep this in mind when submitting similar successful projects for review under Criteria 1.
- Flexible and Scalable Solution: The proposal shall offer all of the services required to successfully deliver the project but should present a schedule that allows for adjustment, addition and/or deletion of specific activities as necessary to reflect budget availability, Regional Council direction or the evolution of the engagement.
- Cost and Time Effectiveness: The proposal shall indicate how the successful proponent will effectively use the Municipality's internal resources.

e) Evaluation Criteria 5 – Project Management Methodology

- Management Structure: The Proposal shall include an organizational chart indicating a clear reporting structure and escalation methodology.
- Proposed Communication Methods: The proposal shall also indicate the number and frequency and method (i.e. /in person, web-conference, tele-conference, etc.) of the anticipated meetings. Meeting dates should also be included in schedule per requirements of section.
- Quality Assurance Standards: A description of Proponents Quality Assurance methods and practices should be included.

f) Business/Technical Response – Other information

The following information shall be included in your Business/Technical response but is not an evaluated as a stand-alone criterion.

- Sustainability: The Municipality is committed to purchasing sustainable goods, services, and construction. To aid the evaluation committee in better understanding the sustainable attributes for this purchase the proponent should prepare the following:
 - A brief statement, to maximum of (2) pages, that outlines the proponent's commitment to the sustainable operations of the Municipality
 - Given the requirements in this RFP, describe how the service that you are proposing will be provided in a sustainable manner (e.g. considering greenhouse gas reduction, waste reduction, toxicity reduction, worker health and safety).
 - If the requirement includes a good as part of the RFP, also include the following question:

Considering the manufacture, uses, and end-of-life disposal of the product proposed, describe the sustainable attributes of the product (e.g. considering greenhouse gas reduction, waste reduction, toxicity reduction, worker health and safety).

2. Evaluation of the Business/Technical Proposal

a) Stage 1 – Mandatory Criteria

- a. The proposal must meet any and all of the mandatory criteria as referenced in the Scope of Work and clearly demonstrate that these are met in a substantially unaltered form. If the proposal fails to meet any one of these criteria, it will receive no further consideration during the evaluation process and be deemed non-compliant.
- b. The proposal must clearly demonstrate the proponent's experience and ability to fulfill the Service Requirements.

b) Stage 2 – Proposal Evaluation Criteria

- a. All proposals which pass Stage 1 – Mandatory Criteria will be evaluated and ranked against the weighted Proposal Evaluation Criteria. Proponents are reminded that the proposal is the main document used in the evaluation and to include all required and pertinent information in their proposal. Proposals not achieving a minimum of 75% of the total available technical points will no longer be considered and the Cost Proposal will remain unopened.
- b. To assist in the evaluation of proposals, the Evaluation Committee may, but is not required to:
 - i. contact any or all of the client/customer contacts cited in a proposal to verify any and all information regarding a proponent and rely on and consider any relevant information obtained from such references in the evaluation of proposals;
 - ii. conduct any background investigations that it considers necessary and consider any relevant information obtained from such investigations in the evaluation of proposals;
 - iii. Seek clarification from a proponent only if certain information in their proposal is ambiguous or missing and such clarification does not offer the proponent the opportunity to improve the competitive position of its proposal.

3. Cost Proposal Requirements

- a) The cost proposal shall be submitted at the same time as the technical proposal as a separate document in a **separate sealed envelope**
- b) The Cost Proposal shall include a single page duly signed stating the proponent's firm fixed total price for this service as outlined in the Request for Proposal.
- c) Proponents should include within the Cost Proposal on a separate page or pages, a detailed listing of the tasks and activities with a breakdown into work packages, details of all individual costs of the proposed services, and total costs (Fixed firm). The cost proposal is to be a separate document.
- d) The total cost shall represent the maximum payment for the project. Price data should include fixed price, estimated hours of work by key staff and individual hourly cost for staff. Include and identify expenses and HST separately. Price may not be the determining factor for award.

4. Evaluation of the Cost Proposal

The proposal with the lowest cost shall receive the maximum points allocated for cost in the Evaluation Scoresheet. All other proposals will be prorated using the lowest cost bid and the following formula:

Max Available Pts. – [Max Available Pts. X (total cost – lowest total cost) / lowest total cost]

Note: If the result is a negative number, the score assigned will be 0

Example: Two technically compliant bids are received and the maximum available points for cost equal 30:

Bid 1: \$100,000

Bid 2: \$130,000

Bid 1 being the lowest, would achieve a score of 30 points

Bid 2 would achieve a score of 21 points, calculated as follows:

$30 - [30 \times (\$130,000 - \$100,000) / \$100,000] = 21$

5. Award of Contract

- a) The Municipality reserves the right to modify the terms, or cancel, or reissue the RFP at any time at its sole discretion.
- b) The RFP should not be construed as an offer or a contract to purchase goods or services. Although proposals will be assessed in light of the evaluation criteria, the Municipality is not bound to accept the lowest priced or highest scoring proposal or any proposal. The Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever, in its opinion, best serves the interests of the Municipality.
- c) Subsequent to the submissions of proposals, interviews may be conducted with some of the proponents, but there will be no obligation to receive further information, whether written or oral from any proponent.
- d) The Municipality will not be obligated in any manner to any proponent until a written contract has been duly executed. Any damages arising out of a breach by the Municipality, including damages for any implied duty at law, are limited to the lesser of the proponent's actual costs of preparing their proposal and \$1,000. Neither acceptance of a proposal, nor execution of a contract, will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any statute, regulation or by-law.
- e) The Municipality offers debriefings to unsuccessful proponents. An unsuccessful proponent must request a debriefing in writing within 10 (ten) days from the date of the Municipality posting the award on the Nova Scotia Public Tenders website. Upon timely receipt, the Municipality will contact the interested proponent to arrange a date, time and place for the debrief, which normally will be conducted in person.

6. Method of Award

The evaluation process will be carried out by an evaluating committee who shall establish the ranking of all the proposals and may produce a short list. The short-listed proponents may be invited to make a brief presentation. The evaluating committee will make a recommendation based on the evaluation of the technical and cost proposals, the presentation if offered, and any clarifications made by the proponent during the evaluation process.

APPENDIX A
 EVALUATION CRITERIA/SCORESHEET

Criteria	Summary (considerations may include but are not limited to the following)	Score
Communication Skills	Clarity and readability of written proposal	5
Team composition and experience	Sector specific experience of the Proponent Firm <ul style="list-style-type: none"> • Sector Specific Experience • Experience of Project Lead with Projects of similar scope and size • Key Team Members appropriate skills and education • Demonstrated history of proposed Team • Balance Level of effort 	20
Understanding of the Municipality's needs	<ul style="list-style-type: none"> • Understanding of the requirements of the scope of work • Acceptable proposed schedule and work plan • Value added propositions and recommendations • Attention to relevant challenges 	20
Business/Technical Solution	<ul style="list-style-type: none"> • Business/Technical Solution • Methodology • Flexible and Scalable Solution • Cost and Time Effectiveness 	20
Project Management Methodology	<ul style="list-style-type: none"> • Management structure • Proposed communication methods • Quality Assurance standards 	5
Subtotal (Business/Technical Proposal)		
Cost		30
		100