



RFP-FIN-01-2017

Development Charges Background Study & By-Law Update

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INFORMATION TO PROPONENTS

1. Scope of Project

The Town of St. Marys is seeking proposals for Development Charges Background Study & By Law Update.

2. Date of Proposal Submission

Proposals shall be submitted in a sealed, opaque envelope addressed as follows:

Town of St. Marys
RFP-FIN-01-2017
Jim Brown –Director of Finance
P.O. Box 998, 408 James Street South
St. Marys, ON N4X 1B6

Proposals must be submitted under the following instructions.

PROPOSAL CLOSING DATE: February 14, 2017
TIME: 2:00 p.m., local time
LOCATION: Town of St. Marys
Municipal Operations Centre
408 James Street South
St. Marys, Ontario N4X 1B6

PUBLIC PROPOSAL OPENING

Submissions received by the date and time of closing will be opened immediately following the time of Proposal closing.

3. Project Contact

Jim Brown –Director of Finance
Town of St. Marys
(519) 284-2340 ext.217
jbrown@town.stmarys.on.ca

4. Completion Date

Passing of Development Charges By-law with an effective date of January 1, 2018.

5. Scope of Work

5.1 Terms of Reference

The Corporation of the Town of St. Marys (hereinafter referred to as “the Town”) is seeking to engage a consultant to update the Town’s Development Charges Background Study and to prepare an updated draft Development Charges By-Law pursuant to the *Development*

Charges Act, 1997, S. O. 1997, Chapter 27, as amended. The Town's current Development Charges By-Law No. 51 of 2013, will expire on February 28, 2018.

5.2 Background

The Town of St. Marys is a single tier municipality with a population of approximately 6,600 located 20 kilometers west of Stratford and northeast of London. Being a separated Town, St. Marys is responsible for almost all municipal services. St. Marys partners with Perth County and/or Stratford, in the provisions of select services (ambulance, seniors home, social assistance.) The town is a dynamic growing community with much to offer to its many visitors and potential developers and entrepreneurs. St. Marys is a beautifully situated town with a promising future.

6. Intent of the Proposal

6.1 Requirements & Deliverables

The Background Study shall meet all requirements of the Development Charges Act, and related Regulations. The report shall be clearly written and well organized, include a table of contents and appendices containing supporting data and information and a draft by-law. The consultant will provide, in a format satisfactory to the Town, electronic copies of the draft and Final Reports and all work completed for the Town.

6.2 Components to be addressed in the Background Study

Review current and long term population and growth analysis and if necessary, undertake an update of this analysis and other primary statistical and data elements.

Evaluate options for Development Charges based on geographic service areas; developing an appropriate methodology for calculating levels of service and allowable charges for service eligible for development charges funding.

Determine the extent where service areas can be broken out.

Evaluate various Service Area Options including calculating appropriate development charges rates for each potential Service Area.

Complete a cash-flow analysis based on revenues and expenditures to ensure anticipated development charges revenue will provide for necessary expenditures.

Calculate Incremental Operating Costs related to growth expenditures.

Assist the Town in considering new services to be included in the By- Law.

Provide advice with respect to various development charges related issues.

Ensure the Study meets all the requirements of the Development Charges Act, as amended and related Regulations.

6.3 Study Completion Date

The Study is required to be completed in a timely fashion to support the adoption of a new Development Charges By-Law with an effective date of January 1, 2018.

Town staff will co-ordinate the consultation process including notification to stakeholder groups and the public with respect to meetings and providing handout material. The consultant will present information and be available to respond to inquiries at public meetings regarding the Study.

6.4 Meetings

The consultant will attend and make presentations to:

- Stakeholder groups (estimated 1 meeting)
- Public Meetings as required under the Act (1 meeting)
- Meeting with Members of Council (2 meetings)
- Interview and work with the Town's Senior Management Team

7. Proposal Structure and Content Requirements

7.1 Proposal Submission Structure

The proposal document should be structured in sections that refer to the headings addressed in the Proposal Content Requirements of this section and should be numbered and tabbed accordingly.

7.2 Proposal Content Requirements

SECTION #	CONTENT
1	Company Profile
2	Project Experience
3	Approach, Methodology & Project Schedule
4	Consultant Team
5	Cost Factor

7.2.1 Company Profile

Proponents are to provide company information such as, but not limited to the following:

- a) Provide a general company profile including the ownership and affiliations of the firm and number of years the firm has been in business;
- b) Address and contact information for the proposing entity; and
- c) Size of company, number of employees both locally and other.

7.2.2 Project Experience

Brief documentation on significant similar projects, with client references (minimum of 3). The Town reserves the right to contact references, which may affect a Proponent's evaluation score. References associated with the Town of St. Marys are not an acceptable reference.

7.2.3 Approach, Methodology & Project Schedule

Describe the firm's approach and methodology.

In this part of the proposal please also submit a project schedule. Clearly identify key milestone dates.

As stated in the Terms of Reference, it is the intention of the Town to have a new Development Charges By-Law effective as of January 1, 2018.

7.2.4 Consultant Team

Please provide the proposed consultant team expected to serve the Town, detailing how they will be organized and including their capabilities, experience, and any special skills of each individual team member.

7.2.5 Cost Factor

The Proponent's submission shall include:

- Overall project cost exclusive of HST.
- A detailed cost and time breakdown of each major activity identified in the proposal.
- A time and cost breakdown for each team member.
- Identifying any disbursements and the associated costs.
- A fee schedule and hourly rates for all project team members.

8. Proposal Process

8.1 Request for Proposal Schedule

The following timeline has been established for the Proposal selection process:

	Date
Request for Proposals Issued:	January 6, 2017 at 2:00 p.m.
Proponent Questions Received By:	February 3, 2017 at 2:00 p.m.
Town to Provide Answers By:	February 7, 2017 at 2:00 p.m.
Proposals Due Date:	February 14, 2017 at 2:00 p.m.
Target Date for Review of Proposals:	February 15, 2017
Anticipate Decision on Successful Proponent:	February 28, 2017
Anticipate Commencement Date of Work:	March 1, 2017

NOTE: Although every attempt will be made to meet all dates, the Town reserves the right to modify any or all dates at its sole discretion.

8.2 Documentation

- (a) One (1) original and three (3) copies of the proposal are required.
- (b) All proposals must be legible and written in ink or typewritten.
- (c) All proposals must be submitted in a sealed envelope.

8.3 Communications

All requests for information and/or clarification as well as questions regarding the interpretation of the terms set out in this RFP should be referred to:

Jim Brown Director of Finance 519-284-2340 ext 221 jbrown@town.stmarys.on.ca

9. Evaluation Criteria

Each response to this Request for Proposals will be evaluated by the Town to determine the degree to which it responds to the requirements as set out. Because this is a Request for Proposals, other factors in addition to cost will be considered when submissions are evaluated.

Factors to be considered will include, but not necessarily be limited to:

Evaluation Criteria	Weighted Percentage
Company Profile	10
Project Experience	20
Approach, Methodology & Project Schedule	20
Consultant Team	10
Cost Factor	40
Total	100

The Proponent Declares:

1. No person, firm or corporation, other than the Proponent, has any interest in this Proposal or in the proposed agreement for which this Proposal is made and to which it relates;
2. This Proposal is made by the Proponent without any connection, knowledge or comparison of figures, or arrangements with, or knowledge of any other corporation, firm or person making a Proposal for the same service, and is in all respects fair and without collusion or fraud;
3. No member of the Municipal Council or any other officer of the Corporation will become interested directly or indirectly as a contracting party without disclosing his interest and otherwise complying with the *Municipal Conflict of Interest Act*, RSO 1990;
4. The content and requirements of this Proposal document have been read and understood.

10. Disqualification

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

11. Examination of Documents

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

12. Proposal Withdrawal or Replacement

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

13. Proposal Evaluation

All submissions must be in compliance with the requirements of the RFP process in order to be considered for evaluation.

Even though Proposals are received based on furnishing product which may meet the minimum requirements indicated, it is not intended that this alone shall limit the award but that other factors shall be considered together with any related experience the Corporation may or may not have had.

All qualified Proposals will be reviewed and evaluated by the selection committee.

It will be the responsibility of the selection committee to initially read, review and evaluate each Proposal. The selection committee may “short list” those Proposals that are most feasible for further consideration.

Proponents may be required to make an oral presentation in support of the proposal.

14. Proposal Award Procedure

All Proposals shall be final and binding on the Proponent for a period of 60 (sixty) days from the closing date and may not be altered by any subsequent offerings, discussions, or commitments unless the Proponent is requested to do so by the Corporation.

The Corporation will notify the Successful Proponent of the award. The Successful Proponent agrees to execute a Professional Service Agreement to undertake work within 10 business days of the date of notification of Award.

15. Extra Work

The Town shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Proponent(s) prior or subsequent to or by any reason of the acceptance or non-acceptance by the Town of any Proposal by reason of any delay in the acceptance of a Proposal.

16. Payment Of Fees

The successful Proponent will provide the Town with a timeline of deliverables with their associated cost. The timeline will be mutually agreed upon and appended to the agreement. The Town will pay the Proponent its fees based on the completion of milestones as defined within the Proponent's proposal. Invoices shall be forwarded to:

Town of St. Marys
Attention: Director of Finance
Jim Brown
408 James Street South Box 998
St. Marys, On N4X 1B6

17. Acknowledgement to Receipt of Addenda

This will acknowledge receipt of the following addenda and, that the fee includes the provision set out in such addenda. Please list the addenda number and the date received by the Proponent.

Example: Addenda #1 received *Month Day, YEAR*

1. Addenda #1
2. Addenda #2
3. Addenda #3

Check here if NO Addenda received

18. Addenda

Questions of clarification will be answered individually, but response(s) to any question that modifies the scope of the RFP will be posted as a RFP Addendum on the Corporation's website.

Amendment and changes to this Proposal prior to the closing date and time stated herein will only be in the form of written Addenda and said Addenda will be issued by the Corporation. Addenda will be posted on the Corporation's website at [Town of St. Marys Tenders](#). It is the Proponents sole responsibility to check this website regularly to inform itself of any posted Addenda. The Corporation makes no promise or guarantee that Addenda will be delivered by any means to any Proponent. By submitting a Proposal in response to the Request for Proposal, the Proponent acknowledges and agrees that addenda shall be posted on the Corporation website and it is the sole responsibility of the Proponent to check the website for said addenda. Addenda will not be released less than seventy-two (72) hours prior to the close of the Proposal. Any submission that does not acknowledge receipt of addenda shall be considered as incomplete and will be disqualified.