



PREVIEW
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Request for Proposal
Museum of Dufferin Strategic Plan

Request for Proposals No: RFP2021 MU-21-03

Issued: **May 31, 2021**

Submission Deadline: **June 24, 2021 2:00 PM local time**

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PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

1.1 INVITATION TO PROPONENTS

This Request for Proposals (the "RFP") is an invitation by the Corporation of the County of Dufferin (the "County") to prospective proponents to submit proposals for a **Museum of Dufferin Strategic Plan**, as further described in Section A of the RFP Particulars (Appendix D) (the "Deliverables").

The County has a maximum budget of \$40,000.00, excluding HST for the entire project.

1.2 RFP Contact

To contact the County in relation to this RFP, proponents must register with the County's bidding system at <https://dufferincounty.bidsandtenders.ca/Module/Tenders/en> and initiate the communication electronically through the Question and Answer function. The County will not accept any proponent's communication by any other means, except as specifically stated in this RFP. For the purposes of this procurement process, the "RFP Contact" will be:

purchasing@dufferincounty.ca

Proponents should only contact the RFP Contact where specifically instructed to in this RFP. All other communication in relation to this RFP must be through the County's bidding system, as described above.

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials or other representatives of the County, other than in accordance with this section. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent's proposal.

1.3 CONTRACT FOR DELIVERABLES

1.3.1 TYPE OF CONTRACT

The selected proponent will be required to enter into an agreement with the County for the provision of the Deliverables in the form attached as Appendix A to the RFP (the "Agreement"). It is the County's intention to enter into the Agreement with only one (1) legal entity.

1.3.2 TERM OF CONTRACT

The term of the Agreement is to the completion of the study to the satisfaction of the County, including, a final presentation to the Committee.

1.4 RFP TIMETABLE

1.4.1 KEY DATES

Issue Date of RFP	May 31, 2021
Deadline for Questions	June 15, 2021 12:00 PM local time
Submission Deadline	June 24, 2021 2:00 PM local time
Anticipated Execution of Agreement	Week of July 19, 2021
Irrevocability Period	Ninety (90) days

The RFP timetable is tentative only, and may be changed by the County at any time.

1.4.2 SITE VISIT / PRE-BID MEETING (NOT APPLICABLE)

1.5 SUBMISSION OF PROPOSALS

1.5.1 PROPOSALS TO BE SUBMITTED TO PRESCRIBED LOCATION

Proposals must be submitted to:

<https://dufferincounty.bidsandtenders.ca/Module/Tenders/en>

1.5.2 PROPOSALS TO BE SUBMITTED ON TIME

Proposals must be submitted on or before the Submission Deadline. Proposals submitted after the Submission Deadline will not be accepted. Proponents are advised to make submissions well before the deadline. Proponents making submissions near the deadline do so at their own risk.

1.5.3 PROPOSALS TO BE SUBMITTED IN PRESCRIBED FORMAT

All proponents shall have a bidding system vendor account and be registered as a plan taker for this opportunity, which will enable the proponent to download the solicitation document, to receive addenda email notifications, download addenda and submit their proposals electronically through the bidding system.

Proponents are cautioned that the timing of their submission is based on when the proposal is received by the bidding system, not when a proposal is submitted by a proponent, as transmission can be delayed due to file transfer size, transmission speed or other technical factors.

For the above reasons, the County recommends that proponents allow sufficient time to upload their submission and attachment(s) (if applicable) and to resolve any issues that may arise. The closing date and time shall be determined by the County's bidding system web clock.

Proponents should contact the RFP Contact at least twenty-four hours prior to deadline if they encounter any problems. The bidding system will send a confirmation email to the proponent

advising when the proposal was submitted successfully. If proponents do not receive a confirmation email, they should contact the RFP Contact immediately.

To ensure receipt of the latest information and updates via email regarding this opportunity, or if a proponent has obtained this solicitation document from a third party, the onus is on the proponent to create a bidding system vendor account and register as a plan taker for the opportunity at [\[dufferincounty.bidsandtenders.ca\]](https://dufferincounty.bidsandtenders.ca).

1.5.4 AMENDMENT OF PROPOSALS

Proponents may amend their proposals prior to the Submission Deadline. However, the proponent is solely responsible for ensuring that the amended proposal is received by the bidding system by the Submission Deadline.

1.5.5 WITHDRAWAL OF PROPOSALS

Proponents may withdraw their proposals prior to the Submission Deadline. To withdraw a proposal prior to the Submission Deadline, the proponent is solely responsible for ensuring that the proposal is withdrawn through the bidding system. The County is under no obligation to return withdrawn proposals.

1.5.6 PROPOSALS IRREVOCABLE AFTER SUBMISSION DEADLINE

Proposals shall be irrevocable for a period of 90 days running from the moment that the Submission Deadline passes.

[End of Part 1]

PART 2 – EVALUATION AND AWARD

2.1 STAGES OF EVALUATION

The County will conduct the evaluation of proposals in the following stages:

2.2 STAGE I – MANDATORY SUBMISSION REQUIREMENTS

Stage I will consist of a review to determine which proposals comply with all of the mandatory submission requirements. Proposals that do not comply with all of the mandatory submission requirements as of the Submission Deadline will, subject to the express and implied rights of the County, be rejected. The mandatory submission requirements are listed in Section C of the RFP Particulars (Appendix D).

2.2.1 NO AMENDMENT TO FORMS

Other than inserting the information requested on the mandatory submission forms set out in the RFP, a proponent may not make any changes to any of the forms. Any proposal containing any such changes, whether on the face of the form or elsewhere in the proposal, may be disqualified.

2.3 STAGE II – EVALUATION

Stage II will consist of the following two sub-stages:

2.3.1 MANDATORY TECHNICAL REQUIREMENTS

The County will review the proposals to determine whether the mandatory technical requirements as set out in Section D of the RFP Particulars (Appendix D) have been met. Proposals that do not comply with all of the mandatory technical requirements will, subject to the express and implied rights of the County, be disqualified and not evaluated further.

2.3.2 RATED CRITERIA

The County will evaluate each qualified proposal on the basis of the non-price rated criteria as set out in Section F of the RFP Particulars (Appendix D).

2.4 STAGE III – PRICING

Stage III will consist of a scoring of the submitted pricing of each qualified proposal in accordance with the price evaluation method set out in Pricing (Appendix C). The evaluation of price will be undertaken after the evaluation of mandatory requirements and rated criteria has been completed.

2.5 SELECTION OF TOP-RANKED PROPONENT

After the completion of Stage III, all scores from Stage II and Stage III will be added together and proponents will be ranked based on their total scores. Subject to the reserved rights of the County, the top-ranked proponent will be selected to enter into the Agreement in accordance with the

following section. In the event of a tie, the selected proponent will be the proponent selected by way of coin toss.

2.6 NOTICE TO PROPONENT AND EXECUTION OF AGREEMENT

Notice of selection by the County to the selected proponent shall be in writing. The selected proponent shall execute the Agreement in the form attached as Appendix A to this RFP and satisfy any other applicable conditions of this RFP, including the pre-conditions of award listed in Section E of the RFP Particulars (Appendix D), within fifteen (15) days of notice of selection. This provision is solely for the benefit of the County and may be waived by the County.

2.7 FAILURE TO ENTER INTO AGREEMENT

If a selected proponent fails to execute the Agreement or satisfy any pre-conditions of award within fifteen (15) days of notice of selection, the County may, without incurring any liability, proceed with the selection of another proponent and pursue all other remedies available to the County.

[End of Part 2]

PART 3 – TERMS AND CONDITIONS OF THE RFP PROCESS

3.1 GENERAL INFORMATION AND INSTRUCTIONS

3.1.1 RFP INCORPORATED INTO PROPOSAL

All of the provisions of this RFP are deemed to be accepted by each proponent and incorporated into each proponent's proposal. A proponent who submits conditions, options, variations or contingent statements inconsistent with the terms set out in this RFP, including the terms of the Agreement in Appendix A, either as part of its proposal or after receiving notice of selection, may be disqualified. If a proponent is not disqualified despite such changes or qualifications, the provisions of this RFP, including the Agreement set out in Appendix A, will prevail over any such changes or qualifications in the proposal.

3.1.2 PROPONENTS TO FOLLOW INSTRUCTIONS

Proponents should structure their proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a proposal should reference the applicable section numbers of this RFP.

3.1.3 PROPOSALS IN ENGLISH

All proposals are to be in English only.

3.1.4 NO INCORPORATION BY REFERENCE

The entire content of the proponent's proposal should be submitted in a fixed format, and the content of websites or other external documents referred to in the proponent's proposal but not attached will not be considered to form part of its proposal.

3.1.5 PAST PERFORMANCE

In the evaluation process, the County may consider the proponent's past performance or conduct on previous contracts with the County or other institutions.

3.1.6 INFORMATION IN RFP ONLY AN ESTIMATE

The County and its advisers make no representation, warranty, or guarantee as to the accuracy of the information contained in this RFP or issued by way of addenda. Any quantities shown or data contained in this RFP or provided by way of addenda are estimates only, and are for the sole purpose of indicating to proponents the general scale and scope of the Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

3.1.7 PROPONENTS TO BEAR THEIR OWN COSTS

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

3.1.8 PROPOSAL TO BE RETAINED BY THE COUNTY

The County will not return the proposal or any accompanying documentation submitted by a proponent.

3.1.9 NO GUARANTEE OF VOLUME OF WORK OR EXCLUSIVITY OF CONTRACT

The County makes no guarantee of the value or volume of work to be assigned to the successful proponent. The Agreement will not be an exclusive contract for the provision of the described Deliverables. The County may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

3.2 COMMUNICATION AFTER ISSUANCE OF RFP

3.2.1 PROPONENTS TO REVIEW RFP

Proponents shall promptly examine all of the documents comprising this RFP, and

- (a) shall report any errors, omissions, or ambiguities; and
- (b) may direct questions or seek additional information

in writing to the bidding system question and answer function on or before the Deadline for Questions. All questions or comments submitted by proponents to the bidding system question and answer function shall be deemed to be received once the email has entered into the bidding system. An on-screen confirmation message will appear in the bidding system once the question has been received. No such communications are to be directed to anyone or by any other means than submission through the bidding system and the County shall not be responsible for any information provided by or obtained from any source other than the RFP Contact or the bidding system. The County is under no obligation to provide additional information. It is the responsibility of the proponent to seek clarification through the bidding system on any matter it considers to be unclear. The County shall not be responsible for any misunderstanding on the part of the proponent concerning this RFP or its process.

3.2.2 ALL NEW INFORMATION TO PROPONENTS BY WAY OF ADDENDA

This RFP may be amended only by addendum in accordance with this section. If the County, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all proponents by addenda. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by the County through the bidding system. Proponents will be required to check a box for acceptance of addenda before submitting their proposal through the bidding system.

3.2.3 POST-DEADLINE ADDENDA AND EXTENSION OF SUBMISSION DEADLINE

If the County determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, the County may extend the Submission Deadline for a reasonable period of time.

3.2.4 VERIFY, CLARIFY, AND SUPPLEMENT

When evaluating proposals, the County may request further information from the proponent or third parties in order to verify, clarify, or supplement the information provided in the proponent's proposal. The response received by the County shall, if accepted by the County, form an integral part of the proponent's proposal.

3.3 NOTIFICATION AND DEBRIEFING

3.3.1 NOTIFICATION TO OTHER PROPONENTS

Once the Agreement is executed between the County and a proponent, the other proponents may be notified directly in writing and shall be notified by public posting of the outcome of the procurement process.

3.3.2 DEBRIEFING

Proponents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the RFP Contact and must be made within sixty (60) days of such notification.

3.3.3 PROCUREMENT PROTEST PROCEDURE

If a proponent wishes to challenge the RFP process, it should provide written notice to the RFP Contact in accordance with applicable procurement protest procedures.

3.4 CONFLICT OF INTEREST AND PROHIBITED CONDUCT

3.4.1 CONFLICT OF INTEREST

For the purposes of this RFP, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFP process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:
 - i. having, or having access to, confidential information of the County in the preparation of its proposal that is not available to other proponents;
 - ii. having been involved in the development of the RFP, including having provided advice or assistance in the development of the RFP;

- iii. receiving advice or assistance in the preparation of its response from any individual or entity that was involved in the development of the RFP;
 - iv. communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process); or
 - v. engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive RFP process or render that process non-competitive or unfair; or
- (b) in relation to the performance of its contractual obligations contemplated under a contract for the Deliverables, the proponent's other commitments, relationships, or financial interests:
- i. could, or could be seen to, exercise an improper influence over the objective, unbiased, and impartial exercise of its independent judgement, or
 - ii. could, or could be seen to, compromise, impair, or be incompatible with the effective performance of its contractual obligations.

3.4.2 DISQUALIFICATION FOR CONFLICT OF INTEREST

The County may disqualify a proponent for any conduct, situation, or circumstances, determined by the County, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above.

3.4.3 DISQUALIFICATION FOR PROHIBITED CONDUCT

The County may disqualify a proponent, rescind a notice of selection, or terminate a contract subsequently entered into if the County determines that the proponent has engaged in any conduct prohibited by this RFP.

3.4.4 PROHIBITED PROPONENT COMMUNICATIONS

Proponents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in the Submission Form (Appendix B).

3.4.5 PROPONENT NOT TO COMMUNICATE WITH MEDIA

Proponents must not at any time directly or indirectly communicate with the media in relation to this RFP or any agreement entered into pursuant to this RFP without first obtaining the written permission of the RFP Contact.

3.4.6 NO LOBBYING

Proponents must not, in relation to this RFP or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the successful proponent(s).

3.4.7 ILLEGAL OR UNETHICAL CONDUCT

Proponents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion, or collusion. Proponents must not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials, or other representatives of the County; deceitfulness; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this RFP.

3.4.8 PAST PERFORMANCE OR PAST CONDUCT

The County may prohibit a proponent from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the proponent to honour its submitted pricing or other commitments; or
- (c) any conduct, situation, or circumstance determined by the County, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

3.5 CONFIDENTIAL INFORMATION

3.5.1 CONFIDENTIAL INFORMATION OF THE COUNTY

All information provided by or obtained from the County in any form in connection with this RFP either before or after the issuance of this RFP

- (a) is the sole property of the County and must be treated as confidential;
- (b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract for the Deliverables;
- (c) must not be disclosed without prior written authorization from the County; and
- (d) must be returned by the proponent to the County immediately upon the request of the County.

3.5.2 CONFIDENTIAL INFORMATION OF PROPONENT

A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the County. The confidentiality of such information will be maintained by the County, except as otherwise required

by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis to advisers retained by the County to advise or assist with the RFP process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted to the RFP Contact.

3.6 RESERVED RIGHTS AND LIMITATION OF LIABILITY

3.6.1 RESERVED RIGHTS OF THE COUNTY

The County reserves the right to

- (a) make public the names of any or all proponents;
- (b) make changes, including substantial changes, to this RFP provided that those changes are issued by way of addendum in the manner set out in this RFP;
- (c) request written clarification or the submission of supplementary written information in relation to the clarification request from any proponent and incorporate a proponent's response to that request for clarification into the proponent's proposal;
- (d) assess a proponent's proposal on the basis of:
 - (i) a financial analysis determining the actual cost of the proposal when considering factors including quality, service, price, and transition costs arising from the replacement of existing goods, services, practices, methodologies, and infrastructure (howsoever originally established); and
 - (ii) in addition to any other evaluation criteria or considerations set out in this RFP, consider any other relevant information that arises during this RFP process;
- (e) waive formalities and accept proposals that substantially comply with the requirements of this RFP;
- (f) verify with any proponent or with a third party any information set out in a proposal;
- (g) check references other than those provided by any proponent;
- (h) disqualify a proponent, rescind a notice of selection, or terminate a contract subsequently entered into if the proponent has engaged in any conduct that breaches the process rules or otherwise compromises or may be seen to compromise the competitive process;
- (i) select a proponent other than the proponent whose proposal reflects the lowest cost to the County;

- (j) cancel this RFP process at any stage;
- (k) cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables;
- (l) accept any proposal in whole or in part; or
- (m) reject any or all proposals;

and these reserved rights are in addition to any other express rights or any other rights that may be implied in the circumstances.

3.6.2 LIMITATION OF LIABILITY

By submitting a proposal, each proponent agrees that

- (a) neither the County nor any of its employees, officers, agents, elected or appointed officials, advisors, or representatives will be liable, under any circumstances, for any claim arising out of this proposal process including but not limited to costs of preparation of the proposal, loss of profits, loss of opportunity, or for any other claim; and
- (b) the proponent waives any claim for any compensation of any kind whatsoever, including claims for costs of preparation of the proposal, loss of profit or loss of opportunity by reason of the County's decision to not accept the proposal submitted by the proponent, to enter into an agreement with any other proponent, or to cancel this proposal process, and the proponent shall be deemed to have agreed to waive such right or claim.

3.6.3 HEALTH AND SAFETY

The Proponent covenants that all its employees are knowledgeable in, and follow the regulations which pertain to their duties which are included in the Occupational Health and Safety Act (R.S.O.) 1990, as amended and associated regulations as appropriate. It should be understood that any contravention of the Act could be considered cause for the County of Dufferin to terminate the Contract.

The Proponent agrees to indemnify and save the Local Municipality and the County, its servants or agents, harmless for damages or fines arising from any breach or breaches of Occupational Health and Safety Act (R.S.O.), 1990, as amended.

The Proponent agrees that any damages or fines that may be assessed against the County of Dufferin by reason of a breach or breaches of the Occupational Health and Safety Act (R.S.O.), 1990, as amended, by the Proponent or any of its subcontractors will entitle the County of Dufferin to offset the damages so assessed against any monies that the County of Dufferin may, from time to time, owe the Proponent under this Contract or under any other contract whatsoever.

The County recognizes that this Contract is being executed during uncertain times with respect to the COVID-19 pandemic.

The successful Proponent will be required to submit a work plan, where and when applicable, that outlines how the company will address the COVID-19 pandemic physical distancing and personal hygiene requirements for their employees, County staff, their vendors and subcontractors, and the public must adhere to all applicable conditions, including but not limited to, directives of the Chief Public Health Officer and local public health units, Occupational Health and Safety Act requirements and recently published Ministry Labour, Training and Skills Development guidelines for work sites during the COVID-19 pandemic.

3.6.4 INSURANCE

The Proponent hereby agrees to put in effect and maintain insurance for the Term, at its own cost and expense, with insurers having a secure A.M. Best rating of B + or greater, or the equivalent, all the necessary and appropriate insurance that a prudent person in the business of the Proponent would maintain including, but not limited to, the following:

- a. Commercial General Liability Insurance on an occurrence basis for third party bodily injury, personal injury and property damage, to an inclusive limit of not less than **\$2,000,000.00** per occurrence and including products and completed operations liability. The policy is to include the following:
 - the County as an additional named insured with respect to liability arising in the course of performance of the Proponent's obligations under, or otherwise in connection with the Contract;
 - contractual liability coverage;
 - cross-liability and severability of interests clause;
 - employer's liability coverage;
 - 30 day written notice of cancellation, termination or material change;
 - tenant's legal liability coverage (if applicable and with suitable sub-limits); and
 - non-owned automobile coverage with blanket contractual coverage for hired automobiles.
- b. The Vendor agrees to insure all vehicles used by him for public liability and property damage in the amount of \$2,000,000 inclusive, and the said Vendor will further undertake to indemnify the County of Dufferin against any liability of any kind or nature whatsoever occasioned by reason of the operation of the Vendor's equipment.

- c. Professional Liability Insurance coverage with a limit of not less than **\$2,000,000.00** per occurrence, subject to an annual aggregate of **\$2,000,000.00** for each member of the Proponent's firm or partnership who will perform work on behalf of the County prior to commencement of work and at the beginning of each calendar year during the appointment period.

The Proponent shall submit proof of such insurance in the form of a Certificate of Insurance, which includes the County of Dufferin as a named insured. The contractor shall give the County of Dufferin thirty (30) days' notice prior to any cancellation or modification of such insurance.

If the Proponent fails to meet the requirements of this section within seven (7) Business Days of receipt by the successful Proponent of the award letter, the County of Dufferin, at its sole option, shall have the right to terminate the Contract.

3.7 GOVERNING LAW AND INTERPRETATION

These Terms and Conditions of the RFP Process (Part 3)

- (a) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive and shall not be construed as intending to limit the pre-existing rights of the County; and
- (c) are to be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

[End of Part 3]

APPENDIX A – FORM OF AGREEMENT

THIS AGREEMENT made in triplicate this _____ day of _____ 2021

BETWEEN _____

of the _____

in the Municipality of _____ and Province of Ontario

hereinafter called the "Vendor"

THE PARTY OF THE FIRST PART

and

THE COUNTY OF DUFFERIN

hereinafter called the "County"

THE PARTY OF THE SECOND PART

WITNESSETH, that the party of the first part, for and in consideration of the payment or payments specified in the bid for this work, hereby agrees to furnish all necessary machinery tools, equipment, supplies, labour and other means of construction and, to the satisfaction of the Contract Administrator, to do all the work as described hereafter, furnish all the materials except as herein otherwise specified, and to complete such works in strict accordance with the plans, specifications, and bid therefore, which are identified and acknowledged in the Schedule of Provisions, Plans, specifications and conditions attached to the bid and all of which are to be read herewith and form part of this present Agreement as fully and completely to all intents and purposes as though all the stipulations hereof have been embodied herein.

DESCRIPTION OF THE WORKS

Contract No. RFP2021 MU-21-03

Museum of Dufferin Strategic Plan in accordance with all items listed on the following
Schedule of Provisions, Plans, Specifications and Conditions.

FOR THE CONTRACT PRICE OF: **[ENTER THE APPROVED CONTRACT PRICE]** excluding HST

IN CONSIDERATION WHEREOF, said party of the second part agrees to pay to the Vendor for all work done, the unit prices on the bid.

The agreement will endure to the benefit of and be binding upon the heirs, executors, administrators and assigns of the parties hereto.

IN WITNESS WHEREOF, the Vendor and the County have hereunto signed their names and set their seals on the day first above written.

FOR THE VENDOR

Signing Officer

Name and Position Held

Date

Date

Witness

Name and Position Held

Date

Date

Witness(es) and Position(s) Held
(Not Required if a Corporation and Seal is used)

Signature of Vendor, Position Held
and Seal of the Corporation

I/we have the authority to bind the corporation

FOR THE COUNTY

Witness

County Warden

Date

Date

Witness

County Clerk

Date

Date

Witness(es) and Position(s) Held
(Not Required if a Corporation and Seal is used)

Signature of designated County
Officers, Position Held and Seal
the County of Dufferin

I/we have the authority to bind the corporation

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APPENDIX B – SUBMISSION FORM

Preview of On-line Bidding System Forms

Please find below a preview only of certain forms/tables that will need to be completed on-line only through the Bidding system by the Respondent as part of their submission.

The Respondent acknowledges that the preview below is provided as a courtesy only (to assist the Respondent in determining the size and scope of the project, etc.) and shall not be relied upon in any way.

Please note that the forms/tables shown below are subject to change/addition/deletion by Addendum(s) issued by the City. Following the issuance of each Addendum, such changes may be reflected in the electronic forms to be completed, but will not be reflected in this document. In the case of the issuance of each Addendum, the Respondents must ensure they acknowledge the Addendum(s) on-line and re-submit their submissions accordingly. It is the Respondent's responsibility to review all Addendum(s) and ensure that the submission reflects the most up-to-date requirements.

For greater certainty, the Respondent shall submit their submission by completing all forms/tables and fields in the on-line Bidding System.

The Respondent's complete submission through the on-line Bidding System is Appendix 'B'. Any responses submitted in any other format or method will be disqualified.

APPENDIX C – PRICING

1. Instructions on How to Provide Pricing

- (a) Proponents should submit their pricing information electronically within the bidding system.
- (b) Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately.
- (c) Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

2. Required Pricing Information

- a) Schedule of Prices
Proponent shall complete the Schedule of Prices fillable form provided in Bids & Tenders.
- b) Schedule of Prices – (Provisional)
Proponent shall complete the Schedule of Prices fillable form provided in Bids & Tenders.
- c) Schedule of Prices – Additional Hourly Rates (Provisional)
Proponent shall provide a list of staff member roles, responsibilities and associated hourly rates. Proponents shall add additional optional rows as necessary to detail all job titles and responsibilities.
- d) Fee Proposal – Price Breakdown
Proponent shall upload in chart, table or spreadsheet format, a breakdown of all costs and total price in Bids & Tenders in the area specified 'Fee Proposal - Price Breakdown'.

The price breakdown shall include, but not be limited to names of all assigned staff, their roles, hourly rates and number of hours allocated to this project and total price per person and any other fees that may be applicable, including breakdown of disbursements. The price breakdown must add up to the Total Price.

3. Evaluation of Pricing

Pricing is worth 20 points of the total score.

Pricing will be scored based on a relative pricing formula using the rates set out in the pricing form. Each proponent will receive a percentage of the total possible points allocated to price for the particular category it has submitted a proposal for, which will be calculated in accordance with the following formula:

$$\text{lowest price} \div \text{proponent's price} \times \text{weighting} = \text{proponent's pricing points}$$

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APPENDIX D – RFP PARTICULARS

A.DELIVERABLES/ SCOPE OF WORK/ DELIVERABLES – SEE APPENDIX D

B. MATERIAL DISCLOSURES

N/A

C. MANDATORY SUBMISSION REQUIREMENTS

1. SUBMISSION FORM (APPENDIX B)

Each proposal must include a Submission Form (Appendix B – the on-line Bids and Tenders submission) completed and submitted online by an authorized representative of the proponent.

2. PRICING (APPENDIX C)

Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

3. OTHER MANDATORY SUBMISSION REQUIREMENTS

Each bid must include all other required forms in Bids & Tenders. The bid submission will not be complete unless all required documents are completed and submitted.

D. MANDATORY TECHNICAL REQUIREMENTS

The County requires that Proponents meet the following mandatory technical requirements:

1. Have successfully completed one or more Strategic Plan(s) in Cultural Institutions in the past five (5) years. Proponents shall upload all documentation and information requested for this Mandatory Technical Requirement in the e-bidding upload area titled: Mandatory Technical Requirement, Item 1;
****Proponents are to identify this as part of their upload submission in Section 2 – References/Comparable Projects.**
2. Have successfully completed one or more Strategic Plan(s) which demonstrates proven experience in approaching strategic planning from a decolonial and/or anti-oppressive lens, complemented by anti-oppressive practice within their own organization/work in the past five

(5) years. Proponents shall upload all documentation and information requested for this Mandatory Technical Requirement in the e-bidding upload area titled: Mandatory Technical Requirement, Item 2.

****Proponents are to identify this as part of their upload submission in Section 2 – References/Comparable Projects.**

E. PRE-CONDITIONS OF AWARD

- a) The proponent agrees that in the event its bid is selected by the County of Dufferin, in whole or in part, it will finalize and execute the Form of Agreement in the form set out in accordance with the terms of this bid.
- b) Within seven (7) days of being requested to do so, the proponent will furnish all of the following to the satisfaction of the County of Dufferin:
 - i. Executed copies of the Form of Agreement duly executed by an authorized signatory of the proponent.
 - ii. The proponent's Workplace Safety and Insurance Board (WSIB) Clearance Certificate (if applicable).
 - iii. Proof of the proponent's compliance with sales tax requirements;
 - iv. the required insurance documents listing the County of Dufferin as an additional insured.
 - v. Any other documents required herein.
- c) If a selected proponent fails to execute the Form of Agreement or satisfy the pre-conditions of award of bid within seven (7) days after being so requested, the County of Dufferin may pursue all available remedies, including, but not limited to, claiming the proponent's bid deposit, and may, without incurring any liability, proceed with the selection of another proponent or cancel the bid process.

EVALUATION CRITERIA

Proposals will be assessed against the following criteria. The Corporation 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.

The Corporation reserves the right to reject any or all proposals. The Corporation also reserves the right not to proceed with the project without stating reason thereof.

Selection of a proposal(s) will be based on all of the criteria outlined below and any other relevant information provided by the Respondent(s).

All proposals are to be submitted with the understanding that the selection of a proposal for discussion by the Evaluation Committee shall not thereby result in the formation of a contract. Nor shall it create any obligation on the County to enter into further discussions.

Evaluation of the project lead and project support staff will include an assessment of the firms overall ability to provide multi-disciplinary capabilities and resources to this project and the Project Managers past experience on similar projects.

The assessment of past project experience will include evaluation of the Consultant's success with previous experience of this nature, the previous experience of proposed staff for this project, the stability and reputation of the firm, particularly in the area of consultant services and the ability to complete projects on time successfully.

The project will be awarded to the respondent who, in the sole judgment of the County, provides the best overall value. The County will not be obligated to select the lowest cost or any proposal.

GENERAL

Evaluation Process (for all criteria except pricing)

The Bid may be analyzed by an Evaluation Committee which will consist of staff from Dufferin County's Purchasing Services, the issuing departments, and other Board staff or consultants as may be required.

Each evaluation criterion will be rated on a scale of 0-10 by the Evaluation Committee, based on the response of the Proponent in its Submission. The rating for all criteria (with exception of price) will be based on the following:

SCALE	EXPLANATION	TYPE OF ANSWER
0	The Proponent did not respond to this requirement	No Response
1-2	The Proponent responded but has met none or very few of the requirements	Poor
3-4	The Proponent has met some of the requirements	Unsatisfactory
5-6	The Proponent has met most of the requirements	Satisfactory
7-8	The Proponent has met all of the requirements	Good
9-10	The Proponent has met all of the requirements, plus has shown the ability to exceed the scope of the requirements	Excellent

Note: In the case of an "Excellent" and the "ability to exceed" rating, there may be instances where an "excellent" score is unattainable.

After the rating (1-10) has been arrived through evaluation, the figure is multiplied by the weighting percentage.

The weighting for each evaluation criterion is pre-determined and the applied percentage represents the significance of that criterion in relation to all other criteria in the overall evaluation.

Criterion Scoring Formula: Rating (1-10) x Weighting = Score

Example: A particular evaluation criterion is given a weighting of 20%. Through the evaluation process, it was determined that the Proponent met all basic provisions and was therefore rated a 5 out of 10. A 5 out of 10 rating would be represented by $5/10 = .5$ rating. This would result in the following equation:

$.5$ (evaluation rating) x 20 (20% weighting) = 10 line score.

The total number of line score points for all evaluation criteria areas of consideration will be used to determine the successful Proponent(s). The award will be made to the Proponent(s) with the highest point total(s).

F. RATED CRITERIA

The following sets out the categories, weightings and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Rated Criteria Category	Weighting (Points)
Stage 1 Mandatory Technical Requirements:	
Mandatory Technical Requirement #1	PASS/FAIL
Mandatory Technical Requirement #2	PASS/FAIL
Stage 2 Rated Criteria:	
Section 1 - Proponent Overview	5
Section 2 – References/Comparable Projects	15
Section 3 - Project Team and Experience	20
Section 4 - Approach and Methodology	20
Section 5 - Work Schedule	20
Fee Proposal – Price Breakdown	20
Total Points	100

Stage 2 Rated Criteria:

Section 1 - Proponent Overview (5%) (maximum 2 pages)

Proponent shall upload their response in Bids & Tenders in the area specified as: '[Section 1 – Proponent Overview](#)'.

Each Proponent should provide the following in its proposal:

- (a) Describe fully your company background, including history and philosophy, organization size, number of employees, office locations etc. Proponents shall supply information that reflects a viable corporate presence in Ontario for at least 24 months prior to the RFP release date. Such a viable corporate presence would be established by the existence of a client base, a functioning sales and support organization, and financial stability.
- (b) A description of its knowledge, skills and experience relevant to the Deliverables.

Section 2 – References and Comparable Projects (15%)

Proponent shall upload their response in Bids & Tenders in the area specified as: 'Section 2 – References and Comparable Projects'.

Proponent shall demonstrate the company's relevant qualifications and experience in projects of a similar scope and magnitude undertaken and completed by the Proponent within the last five (5) years and, in particular by the team members who will be working on this project. **Submissions of the references must include projects referenced under Mandatory Technical Requirements.**

- a. Submit three or more relevant projects that involved strategic planning for cultural institutions and/or strategic planning from a decolonial, anti-oppressive lens.
- b. The projects named are required to be of same size and scope to this project, including an explanation of how components from comparable projects will assist in the completion of work specified in this RFP.
- c. Preference will be given to similar public/municipal sector projects.
- d. For each Reference/Comparable Project form submitted, include the following information:
 - (i) A brief documentation of the project related to strategic planning for cultural institutions and/or strategic planning from a decolonial, anti-oppressive lens.
 - (ii) Identify the main issues (and their resolution) in performing comparable work in the past and how will you apply those lessons learned for the Work specified in this RFP.

Section 3 - Project Team and Experience (20%)

Proponent shall upload their response in Bids & Tenders in the area specified as: '**Section 3 -Project Team and Experience**'. Include an Organizational Chart and Resumes of Key Personnel.

Proponent shall demonstrate that its team members have the necessary technical expertise and project management experience to carry out the requirements of this project. Proponent should identify and provide information about all resources including subconsultants that will be part of the consulting team. The key personnel and subconsultants assigned to the Project shall not be altered unless prior written authorization is obtained from the County.

Organizational Chart

Include an Organization Chart showing all key personnel to be assigned to this project identifying:

- i. team firms (i.e. Proponent and all subconsultant firm names)

- ii. Key Personnel with each firm and their proposed role on this project (i.e. Project Manager)

Resumes of Key Personnel (maximum 2 pages per person)

Provide resumes for each of the Key Personnel from the project team to be assigned to this project whether from the Proponent or subconsultant. Greater and more relevant experience in strategic planning for cultural institutions and/or strategic planning from a(n) decolonial, anti-oppressive lens, will score higher. Resumes should include:

- i. Full Name
- ii. Current and past roles and responsibilities
- iii. Education
- iv. Years of experience (with firm/total)
- v. Relevant (managerial and/or technical) experience
- vi. Professional designations as applicable

The Proponent's team must consist of qualified and experienced staff with knowledge and skills of various disciplines required to perform the Work, including knowledge of proven techniques and tools demonstrating the application of sound judgement for evaluating alternatives that may be brought forward.

- The Project Manager shall be proficient, knowledgeable, experienced and capable of successfully managing projects as outlined in the Deliverables;
- The Project Manager and key personnel must have successfully completed three or more projects related to strategic planning for cultural institutions and/or strategic planning from a(n) decolonial, anti-oppressive lens, in the past five (5) years;
- The Proponent's proposed team shall demonstrate current knowledge of design and preparation of strategic planning for cultural institutions and/or strategic planning from a(n) decolonial, anti-oppressive lens. This experience must be within the last five (5) years;
- The Proponent shall assign a team of qualified and experienced staff and/or subconsultant(s) with knowledge and skills of various disciplines required to perform the Work; and
- Prove their capacity and resources to complete all tasks listed in the Deliverables section based on projects of comparable size and scope.

Subconsultants

Proponents shall complete the 'List of Subconsultants' form provided in Bids & Tenders.

Provide list of all Subconsultants you will be using to undertake the Work along with the type of work. The Subconsultants named are subject to County approval.

The key personnel and Subconsultants assigned to the Project shall not be altered unless prior written authorization is obtained from the County.

A Subconsultant will not be permitted to undertake works more than fifty (50) percent of the total contract price.

Section 4 - Approach and Methodology (20%)

Proponent shall upload their response in Bids & Tenders in the area specified as: 'Section 4 - Approach and Methodology'.

The Proposal shall include a detailed study approach and methodology, which shall include at a minimum;

- a) Description of the Proponent's understanding of the scope of work contained in this RFP, including an explanation of the proposed approach;
- b) A study approach and methodology to successfully complete each task;
- c) Overview of how the deliverables will be produced;
- d) Description of any aspect of the Proponent's methodology, tools and techniques that will enable the work to be carried out more effectively and efficiently;
- e) Communication protocol for both external and internal stakeholders;
- f) Value added (e.g. illustration and visualization capabilities or other tools that will enhance the end results or improve the process);
- g) Proponent shall outline the measures that it has in place to ensure the quality of the deliverables and that the proposed solutions will meet the unique/specific requirements of the County of Dufferin;
- h) Identify any other products or services, not listed within this Document, which would help to achieve the purpose and objectives of this project.**

Section 5 - Work Schedule (20%)

Proponent shall upload their response in Bids & Tenders in the area specified as: 'Section 5 – Work Schedule'. Include a **Gantt Chart and Time Task Matrix** with your response to this Section.

The Proposal shall include a detailed work schedule for the project that commits to a specified completion time. Proponent must demonstrate the capability and capacity to complete the work within time (and budget, if disclosed) parameters outlined in this Request for Proposal. The Work Schedule must include:

- i. A Work Schedule organized by key tasks and milestones in the form of an illustrated GANTT chart. The key tasks and milestones shall be the same as provided in the Proponents Fee Proposal – Price Breakdown;
- ii. **The GANTT chart** shall, in weekly increments, show the start and finish dates for the various activities, identify tasks and individuals who will perform the task including County staff, any requirements for independent resources required for completion of the project;
- iii. **Time task matrix - the personnel to be assigned to the tasks and the number staff hours allotted to each task;**
- iv. The detailed steps and timing through which the Deliverables will be produced;
- v. Task sequences and dependencies, milestones and key events;
- vi. Meeting and consultation schedules;
- vii. A summary of risks/problems/issues associated with the work and how they will be mitigated;
- viii. An estimated overall timeline of the Services, including an indication of how soon the Proponent can commence work including key dates for major deliverables and completion date.
- ix. Any reasonable steps that will advance the completion of the project will be considered.

Although every attempt will be made to adhere to the dates in the critical path, the County reserves the right to modify any or all dates.

G. THE DELIVERABLES

1. INTRODUCTION

The Museum of Dufferin ("MoD," "the Institution") is a rural museum, located in the municipality of Mulmur, owned & operated by the County of Dufferin ("the Organization").

The Museum's roots date to 1963 when the Dufferin County Historical Society established the Shelburne Pioneer Museum. The Museum's artifact collection was officially donated to the County in 1988 and relocated to the current facility by 1994.

The MoD facility, which was renovated in 2018-2019, was built in the style of an Ontario bank-barn to reflect the rural and agricultural heritage of the region.

As part of its regular public offerings, the MoD offers a large Main Gallery, featuring rotating exhibit cases and three historic buildings inside, as well as two rotating exhibit spaces, a permanent Corn Flower exhibit (the largest public collection in the world), archives, educational programming, and events.

As the County invests in tourism development, the role of the MoD is being reevaluated to better serve tourism & economic development initiatives. There is also an appetite to evaluate its potential in better-serving broader County initiatives. To this end, the Museum of Dufferin is seeking proposals from consulting firms to develop a Strategic Plan, including topline recommendations and actions. The Strategic Plan shall:

1. Be built from an anti-oppressive, decolonial lens to ensure the MoD's practices and processes are equitable, inclusive and accessible, to its team and the community it serves.
2. Provide frameworks from which to establish membership structures, community partnerships, events, sponsorships & donations, digitalization, etc.
3. Identify opportunities for cohesion between the MoD's various services and functions, and streamlining within.
4. Support and guide the expansion of MoD services and engagement in Dufferin beyond its physical facility.

Ultimately, this Strategic Plan is meant to be a roadmap to guide MoD initiatives for the next three to five (3-5) years.

The Project Team member(s) must:

- Possess a thorough knowledge & understanding of Strategic Planning from a(n) decolonial, anti-oppressive lens, demonstrated through experience in developing successful and innovative Strategic Plans

- Demonstrate robust experience working with Cultural Institutions (Museums, Libraries, Art Galleries, etc.)
- Demonstrate anti-oppressive practice within their own work
- Have access to sufficient resources to meet the project timelines
- Showcase unique and inclusive approaches to community engagement, to ensure a broad representation of perspectives inform the final recommendations
- Work collaboratively with the MoD team in developing the Strategic Plan, as warranted

Proponents who do not meet these requirements are encouraged to bid in partnership with complementary firms/individuals.

2. BACKGROUND

The Museum of Dufferin ("the MoD", "the Institution") continues to serve communities in Dufferin County ("Dufferin," "the County", "Organization") through various initiatives including Archives, Exhibits, Events and Educational Programming.

Our stated mission is:

- We are a place where everybody belongs.
- We exchange stories about culture, history and community that pose questions and provoke conversations.
- We collect the objects of time and place that allow the community to connect the past, present and future.
- We create physical and virtual spaces which emphasize meaningful engagement.

Our values statement is as follows:

Our community is at the heart of everything we do.

- Collaboration
- Creativity & Innovation
- Passionate & Genuine
- Engagement
- Integrity & Accountability

These mission and values statements are the result of a strategic planning initiative that began to take place internally in early 2020. Though this did not result in a fully-developed plan, the elements produced in that process will be provided to the successful Vendor for valuable insights and understandings.

In an effort to enhance its position within the County organization, as well as the community at large, there is an opportunity to reimagine the role of the MoD in supporting tourism and economic

development initiatives. Optimization of the Institution from an operational, programming and marketing perspective would strengthen financial returns to the County, and generate positive economic impacts for local stakeholders. Further, its position as a social and cultural hub would be strengthened, for both residents and visitors.

A Strategic Plan, coordinated by an external consulting team, must facilitate said optimization and guide the MoD as it evolves into a supporting entity, from an individual entity, within Dufferin County operations.

3. PURPOSE OF STUDY

The development of a MoD Strategic Plan is to be an assessment of the MoD's current function and activities, and seek opportunities for optimization internally, as well as from a community perspective.

Key objectives to be considered in the review and recommendations in this process include:

- A rebuilding on MoD operations to be decolonial and anti-oppressive;
- Improved and optimized synergies between MoD functions, and efficiencies amongst staff;
- Inclusive and accessible service delivery throughout the municipalities of Dufferin County;
- Defined frameworks for community partnerships, membership structures, and overall outputs (Collections, Archives, Programming, Events);
- Expand the appeal to and engagement from the Dufferin community; and
- Identify opportunities for collaboration with other County functions, municipalities and community organizations and stakeholders.

Through the process, the successful Vendor will:

- Understand and analyze the current structure, operations and services of the MoD
 - o Review internal resources, including those relevant from the Organization level
 - o Engage with internal stakeholders from the MoD team
- Identify and analyze community perceptions of the MoD and broader community needs that the MoD could service, via robust engagement initiatives
- Assess and recommend opportunities to enhance the MoD's operations, from both internal and community perspectives, including but not limited to:
 - o Guide operational changes that increase revenue opportunities for the MoD, and local stakeholders
 - o Identify opportunities for the MoD to better-serve and engage with the Dufferin community and municipalities, and to effectively operate from a(n) decolonial, anti-oppressive lens

- Determine opportunities for streamlined planning and processes, to refine MoD staff efficiencies

Ultimately, a Strategic Plan will direct the MoD toward effective, efficient and sustainable operations, in the short and long-term, and allow the Institution to more purposefully serve Dufferin County's broader initiatives and priorities.

A final report shall include operational guidelines, recommendations and action items.

3. SCOPE OF WORK

Required elements of the development process:

Introductions

A project initiation meeting will be held with the MoD manager to confirm the overall scope of the project and to coordinate dates and activities.

The Consulting team will then meet with the MoD team for initial introductions.

To ensure a successful project, the Consulting team shall work with the MoD manager on a communications plan that will ensure the MoD team, County team and community are informed and engaged as appropriate throughout and to outline timelines and approaches to community engagement.

Initial Research & Service Overview

The Consulting team will be provided with background documents and reading material, for foundational understandings.

With appropriate notice, the MoD team can be available for one-on-one conversations or group exercises. Integration of the MoD team to the development process is expected.

Community Engagement

The successful Vendor is expected to conduct a robust and creative community engagement process, with overlapping methods, primarily: consult, involve and collaborate. The process shall involve, though not necessarily be limited to:

- Internal stakeholders, from appropriate and relevant County functions
- Municipal representatives from regions within Dufferin
- Community groups
- Members of the public
- Existing and prospective MoD members

Current public health limitations must be considered in proposed community engagement efforts, though we are eager to adapt plans to changing circumstances.

Analysis

Following research and community engagement, the successful Vendor must conduct at least two different analyses (i.e., SWOT, SOAR, Comparable, etc.) to inform the final strategic plan.

At this stage, findings and a proposed direction must be presented to the MoD team for discussion.

Development & Design of Strategic Plan

The Strategic Plan shall include:

- Executive summary
- Overview: strategic planning process
- Revised mission & vision statement (if found required)
- Goals and principles
- Applicable frameworks & guidelines
- Strategic recommendations and actions
- Additional elements, as deemed relevant & necessary throughout the development process

** Please note: The successful Vendor shall not be limited to including the elements above, nor the order in which they are presented here, within their project submissions.

4. MEETINGS

Meetings will be required throughout the study process with County staff and stakeholders including, but not limited to the following:

- One (1) Initial kick off Meeting with County's Project Manager
- One (1) Initial kick off Meeting with County's Project Manager and staff
- Biweekly progress and Project Status Meetings
- One (1) Presentation Committee

All Meetings will be conducted remotely, subject to change based on directions of the County's Project Manager.

5. SUBMISSIONS

The Vendor shall provide the following reports:

Progress Reports

The Vendor shall submit biweekly reports to the County's Project Manager. These reports shall provide information on study progress, budget spent, project status, and updated project schedules as required.

Draft Reports

The Vendor shall submit one (1) unlocked digital or soft copy of the draft report(s) in MS Word format to the County's Project Manager for review and approval. The draft report(s) must be suitable for reproduction.

Final Report

The final report shall include the above deliverables as refined based on comments received from designated County staff, including findings, recommendations, strategy and the decision framework.

All final approved submissions must be unlocked and submitted as one (1) digital or soft copy in MS Word format, and one (1) digital or soft copy in Adobe Acrobat PDF format.

The successful Vendor will be asked to provide a final version of the plan, designed using the MoD's brand guidelines.

All text documents must be available in both PDF and Microsoft Word format.

Any additional reports requested by the County's Project Manager, will be produced using the hourly rates submitted in the Proponent's bid submission.

6. PROJECT SCHEDULE

The project shall be completed within the timelines specified below:

Project Milestone	Deliverable Date
Anticipated Contract Start date	July 19, 2021
Research and Planning	August 6, 2021
Community Engagement and Analysis	October 1, 2021
Draft Report	November 1, 2021
Final Report	December 10, 2021
Presentation to Committee	January 2022

Work plans proposed by Vendors may include alternate defined project milestones. Dates for Draft Report, Final Report and Presentation remain firm.

Throughout the contract period, the Vendor shall update the project work plan and schedule to show progress in the form of Gantt chart(s) in biweekly increments and submit to the County with their biweekly status report.

It is imperative that the schedule is kept on track and the Project is successfully completed according to schedule.

All changes to the Schedule, if any, must be approved by the County's Project Manager.

Any reasonable steps that will advance the completion of the project will be considered.

7. PROJECT MANAGEMENT (ALL PROJECT PHASES AND ACTIVITIES)

The Vendor shall:

1. Appoint one (1) person as Project Manager, who shall report to the County's Project Manager. The Vendor's Project Manager will:
 - a. Keep the County's Project Manager informed of progress on a regular basis
 - b. Provide the County's Project Manager with copies of all correspondence
 - c. Consult with the County's Project Manager on potentially significant or controversial issues, options considered, and solutions adopted
 - d. Consult with the County's Project Manager prior to deviations from standards, specifications and procedures
 - e. Consult with the County's Project Manager prior to any significant schedule changes. All schedule changes must be approved by the County's Project Manager in writing

- f. Ensure attendance of appropriate experts at meetings to answer questions and ensure expert facilitation of controversial matters.
 - g. Ensure and take the necessary measures to establish the overall process, provide overall direction to the process, liaise with the County's Project Manager when necessary, direct communications, ensure that process and time lines are achieved in order to deliver a complete and comprehensive Studies.
2. Cross-reference the monthly invoice with the activities identified in the Gantt chart prior to submitting the invoice to the County.

Invoicing of fees is to be completed on a timely basis.

8. PROJECT BUDGET

The Country of Dufferin has a maximum budget for this entire contract of \$40,00.00, excluding HST.

RFP2021 MU-21-03 - Museum of Dufferin Strategic Plan

Opening Date: May 31, 2021 6:15 PM

Closing Date: June 24, 2021 2:00 PM

PREVIEW
YOU MUST BE A REGISTERED PLAN TAKER TO
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Schedule of Prices

The Bidder hereby Bids and offers to enter into the Contract referred to and to supply and do all or any part of the Work which is set out or called for in this Bid, at the unit prices, and/or lump sums, hereinafter stated. HST is additional.

* Denotes a "MANDATORY" field

Do not enter \$0.00 dollars unless you are providing the line item at zero dollars to the County.

If the line item and/or table is "NON-MANDATORY" and you are not bidding on it, leave the table and/or line item blank. Do not enter a \$0.00 dollar value.

Schedule of Prices

Instructions on How to Provide Pricing

- Proponents should submit their pricing information electronically within the bidding system.
- Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately.
- Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

Line Item	Description	Unit	Quantity	Price *	Extended Price
1	RFP2021 MU-21-03 Museum of Dufferin Strategic Plan	Lump Sum			

Schedule of Prices - Provisional

Instructions on How to Provide Pricing

- Proponents should submit their pricing information electronically within the bidding system.
- Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately.
- Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

The items listed as provisional may or may not be required under the Contract. The necessity for any of these items will be determined by the County. Should any of these items be required, the Vendor will be compensated on the basis of the price(s) submitted.

Line Item	Description	Unit	Quantity	Price *	Extended Price
1	Presentation to Council	Lump Sum	1		
2	Additional cost per meeting	Lump Sum	1		

Schedule of Prices - Provisional Hourly Rates

Instructions on How to Provide Pricing

- Proponents should submit their pricing information electronically within the bidding system.
- Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately.
- Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

The items listed as provisional may or may not be required under the Contract. The necessity for any of these items will be determined by the County. Should any of these items be required, the Vendor will be compensated on the basis of the price(s) submitted.

Line Item	Staff Member's Job Title *	Brief Description of Responsibilities *	Hourly Rate (excluding HST) *
1			
2			

Bid Questions

D. MANDATORY TECHNICAL REQUIREMENTS

The County requires that Proponents meet the following mandatory technical requirements:

Please indicate “yes” or “no”.

Proponents are to identify this as part of their upload submission in Section 2 – References/Comparable Projects.

Has your firm successfully completed one or more Strategic Plan(s) in Cultural Institutions in the past five (5) years?

Has your firm successfully completed one or more Strategic Plan(s) which demonstrates proven experience in approaching strategic planning from a decolonial and/or anti-oppressive lens, complemented by anti-oppressive practice within their own organization/work in the past five (5) years?

Sub-Contractors

The Bidder shall state all Subcontractor(s) and type of Work proposed to be used for this project. Bidders shall not indicate “TBD” (To Be Determined) or “TBA” (To Be Announced) or similar wording and shall not indicate multiple choices of Subcontractor names for any Subcontractor category in their list of Subcontractors.

The Bidder shall state only one (1) subcontractor for each type of work.

Bidder(s) shall upon request by the Owner produce a list of references for all or any proposed Subcontractors within three (3) business days.

List of Subconsultants

Provide list of all Subconsultants you will be using to undertake the work along with the type of work. The Subconsultants named are subject to County approval.

The key personnel and Subconsultants assigned to the Project shall not be altered unless prior written authorization is obtained from the County.

A Subconsultant will not be permitted to undertake works more than fifty (50) percent of the total contract price.

Line Item	Type of Work	Subcontractor company name	Location (City)	Subcontractor Contact Person	Phone Number	Email	Estimated Value (\$) of work
1							
2							

Documents

It is your responsibility to make sure the uploaded file(s) is/are not defective or corrupted and are able to be opened and viewed by the County. If the attached file(s) cannot be opened or viewed, your Bid Submission may be rejected.

Upload all pages of the RFP document as required.

- Section 1 - Proponent Overview * (mandatory)
- Section 2 – References/Comparable Projects * (mandatory)
- Section 3 - Project Team and Experience * (mandatory)
- Section 4 - Approach and Methodology * (mandatory)
- Section 5 - Work Schedule * (mandatory)
- Fee Proposal – Price Breakdown * (mandatory)

Addenda, Terms and Conditions

1. Offer

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. By submitting a proposal, the proponent agrees and consents to the terms, conditions, and provisions of the RFP, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in its proposal.

2. Rates

The proponent has submitted its rates in accordance with the instructions in the RFP and in Pricing (Appendix C) in particular. The proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

3. Addenda

The proponent is deemed to have read and accepted all addenda issued by the County prior to the Deadline for Issuing Addenda. The onus is on proponents to make any necessary amendments to their proposals based on the addenda.

4. No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this RFP.

5. Proposal Irrevocable

The proponent agrees that its proposal shall be irrevocable for a period of **[**insert number of days**]** days following the Submission Deadline.

6. Disclosure of Information

The proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the County to the advisers retained by the County to advise or assist with the RFP process, including with respect to the evaluation this proposal.

7. Execution of Agreement

The proponent agrees that in the event its proposal is selected by the County, in whole or in part, it will finalize and execute the Agreement in the form set out in Appendix A to this RFP in accordance with the terms of this RFP.

☐

I have the authority to bind the organization

You must declare all potential Conflicts of Interest, as defined in the Conflict of Interest terms in the solicitation document. This includes disclosing the names and all pertinent details of all individuals (employees, advisors, or individuals acting in any other capacity) who (a) participated in the preparation of the proposal; AND (b) were employees of the County within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, you will be deemed to declare that (a) there was no Conflict of Interest in preparing your submission and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the solicitation document.

Otherwise, if the statement below applies, check the box.

• You declare that there is an actual or potential Conflict of Interest relating to the preparation of your submission, and/or you foresee an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the solicitation document.

☐ Yes ☐ No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document

Please check the box in the column **"I have reviewed this addendum"** below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
There have not been any addenda issued for this bid.		

PREVIEW

YOU MUST BE A REGISTERED PLAN TAKER TO
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