



THE MUNICIPALITY OF
LAMBTON SHORES

**REQUEST FOR PROPOSAL FOR THE SUPPLY OF:
Business Retention and Expansion Report and
Action Plan**

Project # 2019-16

CLOSING DATE: Friday, June 28, 2019

TIME: 11:00:00 AM, LOCALTIME

RETURN TO: Municipality of Lambton Shores
Kevin Williams, CAO
7883 Amtelecom Parkway
Forest, ON N0N 1J0

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1. REQUEST FOR PROPOSAL

You are invited to submit a Proposal for the supply of a **Business Retention and Expansion Report and Action Plan**.

The complete Request for Proposal documents are attached for your perusal. Should you have any questions regarding the documents or the process, please contact:

Kevin Williams, CAO
Municipality of Lambton Shores
7883 Amtelecom Parkway
Forest, ON N0N 1J0

519-243-1400, ext. 8610
administration@lambtonshores.ca

All interested bidders are requested to complete a "Bidder Registration Form" as provided on page 14 of this document in order to be advised of any updates and addenda that may be made.

2. PROJECT SCHEDULE

The following is the planned schedule for this Request for Proposal process. The Municipality reserves the right to amend this schedule as it deems necessary.

Schedule of Events	Important Dates
Issuance of RFP	Tuesday, June 11 th , 2019
Deadline to Submit a Bid	Friday, June 28 th , 2019 @ 11:00:00 AM
RFP to be Awarded	Thursday, July 4 th , 2019
Final Business Retention and Expansion Report and Action Plan due	Tuesday, March 31 st , 2020

3. INFORMATION TO BIDDERS

3.1. CLOSING DATE AND TIME

Sealed proposals will be accepted until 11:00:00 AM, local time, Friday, June 28th, for the supply of a Business Retention and Expansion Report and Action Plan more completely described below.

3.2. NATURE OF PROJECT

It is the intention of this request to select a supplier(s) who can provide a Business Retention and Expansion Report and Action Plan.

3.3. SUBMISSION

Proposals must be typed or in ink. Proposals must be signed by an authorized individual. Proposals must be sealed in an opaque envelope/package, clearly marked as Project 2019-16. Proposals sent by e-mail, fax, arriving unsealed or arriving after the stated closing time will not be considered. All submissions are to be received at the front reception desk at the Municipality of Lambton Shores Administration office at the proposal delivery address stated below. Please note the municipal building is in a rural location and next day courier service is not always available.

Proposals must be delivered to:

Kevin Williams, CAO
Municipality of Lambton Shores
7883 Amtelecom Parkway
Forest, ON N0N 1J0

All proposals received must remain valid for acceptance up to 90 days beyond the closing date.

3.4. REQUIRED NUMBER OF COPIES

All submissions should include three (3) copies of the complete proposal.

3.5. SELECTION CRITERIA

Specific selection criterion shall be used in evaluating the proposals received. More details on the selection criteria are contained herein in Section 4.5.

3.6. ACCEPTANCE AND AWARD OF CONTRACT

The Municipality of Lambton Shores reserves the right to accept any proposal, in whole or in part, that it feels most fully meets the selection criteria. Therefore, the lowest cost proposal, or any proposal may not necessarily be accepted. Municipal staff shall evaluate all proposals received by the closing time and make evaluations and recommendations for acceptance.

3.7. SALES TAXES

The quoted prices shall include HST as applicable.

3.8. CLARIFICATION

Should a bidder find discrepancies in or omissions from these Proposal Documents, or should there be any doubt as to their meaning, inquiry should be made to **Kevin Williams**, at administration@lambtonshores.ca. Should a correction, explanation, or interpretation be necessary or desirable, a written addendum will be issued to all registered bidders. Addenda issued during the period prior to the closing date of the RFP are to be considered part of these Proposal Documents.

3.9. WITHDRAWAL OF PROPOSALS

Bidders who have submitted a proposal may withdraw it up to the official closing time by delivering a letter on official company letterhead requesting that the proposal be withdrawn. The letter must be signed by the same individual who signed the original proposal, or should clearly state that the individual signing has the authority to withdraw the proposal. Telephone, e-mail, fax requests, or written requests to withdraw arriving after the closing time will not be accepted.

3.10. RESERVATIONS

The Municipality reserves the right to reject any or all proposals. The lowest priced bidder will not necessarily be awarded a contract.

The Municipality reserves the right to accept any proposal in whole or in parts thereof judged most satisfactory, without liability on the part of the Municipality.

The Municipality may cancel a procurement process at any time without cause if it is in the best interest of the Municipality to do so.

Irregularities contained in bids will be dealt with as outlined in schedule B of the Lambton Shores Procurement and Asset Disposal Policy.

3.11. QUALIFICATION OF BIDDERS

The Municipality requires that all bidders will be able to furnish satisfactory evidence that they have the ability, experience, capital, and resources to enable them to execute and complete the contract successfully. Bidders should provide a list of similar completed projects with reference contact information.

3.12. SUB-CONTRACTING

Bidders must disclose any sub-contractors that they propose to employ in the performance of this contract. Sub-contractors may not be changed after award of the contract without written permission from the Municipality of Lambton Shores.

3.13. PRICES AND BUDGETS

The Municipality of Lambton Shores has a strictly defined budget for the work defined in this document and reserves the right to change the scope of this RFP to bring the proposal price within the available budget limits. Should it be determined that the changes in the scope of the RFP are of sufficient magnitude, then the Municipality shall cancel it. Then, at its discretion, the Municipality may commence a new process in order to complete the project within the budget available.

3.14. INVOICES

The Municipality requires that all invoices be compliant with its requirements and general accounting principles. Bidders must agree to submit detailed invoices in a format acceptable to the Municipality of Lambton Shores. This will include but not be limited to hold back deductions calculated on the total invoice.

3.15. ELECTRONIC FUNDS TRANSFER

The Municipality prefers to pay accounts via Electronic Funds Transfer (EFT). Bidders who are unable or unwilling to accept payment via this method should clearly indicate this within their response.

3.16. PAYMENT

Upon the completion of any work included in this request, the successful bidder shall submit invoices for payment to comply with the contract or payment schedule to be determined in the contract documents. Payment of all invoices will be on a net 30-day basis.

3.17. CONTRACT AND LENGTH OF AGREEMENT

The successful proponent's RFP submission will constitute an agreement for the term of the deliverables.

3.18. SUPPLIER STATUS

The successful proponent shall be considered a supplier of services to the Municipality. At no time will the proponent, or any individual acting for the proponent, be considered an employee of the Municipality of Lambton Shores.

3.19. OTHER INFORMATION

The Municipality reserves the right to require bidders to produce any of the following:

- Appropriate insurance certificates;
- WSIB clearance certificate;
- Financial and corporate information;
- Other additional assurances or protections as deemed necessary by the Municipality of Lambton Shores.

3.20. OWNERSHIP OF DOCUMENTATION AND FREEDOM OF INFORMATION

The information submitted in response to this RFP will be treated in accordance with the relevant provision of the Municipal Freedom of Information and Protection of Privacy Act. The information collected will be used solely for the purposes stated in the RFP. The bidder does, by the submission of a proposal, accept that the information contained in it will be treated in accordance with the process set out in the RFP. Bidders should clearly indicate in their submission which parts, if any, are exempt from disclosure under the Municipal Freedom of Information and Protection of Privacy. Any submitted proposal shall immediately become the property of the Municipality of Lambton Shores.

3.21. RIGHT TO AMEND REQUIREMENTS

Upon awarding the contract based on the information submitted in proposals received, the Municipality reserves the right to work with the successful proponent to modify any of the proposal components outlined in the RFP that are agreeable to all parties. In the event that the chosen supplier fails to act in good faith by refusing or failing to negotiate, or fails to fulfil the intent of the RFP, the supplier will be considered to have abandoned all rights and interest in the contract award and the award may be cancelled without penalty. The award may then be made to the next highest ranked bidder or all proposals may be rejected at the sole discretion of the Municipality.

3.22. BIDDER DISQUALIFICATION

The Municipality may at its sole discretion disqualify a supplier from bidding on any bid solicitation as outlined in Section 32 in the Lambton Shores Policy on the Procurement and Asset Disposal.

3.23. INSURANCE

At the time of execution of the contract the successful proponent shall submit:

- i) Comprehensive liability insurance providing bodily injury limits of at least \$2,000,000 (two million dollars) per person and accident and providing for property damage of at least \$2,000,000 (two million dollars) in any one incident.
- ii) Insurance as in i) for all licensed motor vehicles operated on behalf of the Consultant.
- iii) The liability insurance shall be endorsed to provide that the policy or policies will not be altered, cancelled or allowed to lapse during duration of the Contract without 30 days prior written notice to the Municipality of Lambton Shores.

- iv) The Municipality of Lambton Shores shall be added as an additional insured party, in regard to all work associated with this contract.
- v) Professional Liability insurance in the amount of \$2,000,000 (two million dollars).

The proponent clearly understands and agrees that they are not, nor anyone hired by them, covered by the Municipality under the Workers Compensation Board (WCB).

3.24. WORKER'S SAFETY INSURANCE

It is the obligation of any successful bidder to comply with all requirements of the *Workplace Safety and Insurance Board Act*. Bidders must certify that all employees, officers, agents and sub-contractors are covered or exempt under the *Act*. A WSIB certificate shall be supplied at the time of contract signing and updated every 60 days in compliance with the *Act* unless an exemption is evident. Failure to supply or update this certificate as required is cause for termination of the contract.

4. REQUIREMENTS

4.1. BACKGROUND

The Municipality of Lambton Shores includes the communities of Arkona, Bosanquet, Forest, Grand Bend and Thedford, and a number of other settlement areas. Lambton Shores is home to nearly 12,000 residents and approximately 400 businesses. We are located along the shores of Lake Huron, and our seasonal population can swell to over 30,000 during the summer months. Key industry sectors in Lambton Shores include: tourism, agriculture, retail and public service.

In 2014, municipal Council accepted the Economic Development Action Plan. The Plan identified seven economic action goals, including the development of a Business Retention and Expansion (BR & E) Plan for the municipality. Lambton Shores has received funding through the Rural Economic Development (RED) Program to complete a Business Retention and Expansion Report and Action Plan.

Through expertise, market research and a substantial business engagement strategy, the BR & E Plan will identify strengths, weaknesses, opportunities and threats to Lambton Shores economy. The Plan will recommend specific initiatives that can be implemented to bolster the municipality's growth and prosperity.

There is an expectation that the successful bidder will collaborate with the Sarnia-Lambton Economic Partnership to leverage data they have received to date through their existing BR & E strategy, and will partner to carry out their expansion efforts in Lambton Shores.

4.2. SCOPE

The goal of the BR & E Plan will be to identify specific action items that can be achieved over a ten-year period. The Plan will cover all areas of the municipality, and will not be sector-specific. The Consultant will report to the Municipality, but will have regular interactions with the BR & E Leadership Team that will be comprised of local leaders and municipal staff.

The Consultant will:

- Develop a project work plan that will be presented to the leadership team.
- Organize and lead meetings with the project leadership team and business community as required.
- Review BR & E survey and develop additional local community questions if required (through the Executive Pulse online tool).
- Coordinate data collection and manage access to the Executive Pulse system.
- Collect the contact information for the targeted businesses and inform them about the project.
- Conduct business surveys throughout Lambton Shores. The preference is to have the majority of surveys completed in a face-to-face interview style; however a

combination of web-based or emailed questionnaires may also be used. A minimum of 40 face-to-face interviews spanning across the entire municipality and a variety of sectors is required. Random sampling will be used to select businesses for face-to-face interviews.

- Collect and review completed survey results.
- Assist with responses to immediate business concerns.
- Oversee the data entry and analysis process including the development of a data summary report that will seek to inform the final report and action plan.
- Write the final Business Expansion and Retention report and action plan.
- Present the draft report and action plan to the business community during open house style events.
- Present the final report and action plan to municipal council.

4.3. PROPOSAL CONTENT

The proposal must provide the following mandatory information:

4.3.1. GENERAL REQUIREMENTS

The proposal should provide a work schedule outlining the approach/methodology to be used and include a detailed timeline. The Business Retention and Expansion Plan must be completed by Tuesday, March 31, 2020. Also, include a list of required information to be provided by Municipal Staff.

4.3.2. FIRM QUALIFICATIONS AND EXPERIENCE

The proposal should demonstrate the qualifications of the firm as well as a brief description of the staff member(s) and the relevant experiences and qualifications of each individual along with their anticipated contribution to the study.

4.3.3. REFERENCE

Please provide a list of three municipal clients as references. Include the contact person, address, telephone number and email.

4.3.4. FEES FOR SERVICE

Please include an exact cost and a breakdown including itemization of costs for the various phases or components of the plan as well as rates for any requested additional work beyond the written agreement. Lambton Shores will not be responsible for expenses incurred in preparing and submitting the proposal.

4.4. SELECTION CRITERIA

Proposals will be evaluated using the following weighted criteria:

Component	Description	Percentage
Overall Impression	The overall quality and depth of the proposal	10%
Qualifications	The respondent will be evaluated based on the range of its capabilities, the depth / strength of its organization structure and the qualifications of the individual team members.	15%
Experience	The respondent's experience will be evaluated based upon its past history of successfully providing similar services. References may be contacted in order to verify satisfactory performance on similar projects.	15%
Proposed Approach	The respondent will be evaluated based upon the proposed approach to the project, including work plan / timelines and deliverables.	30%
Professional Fees		30%

5. BIDDER REGISTRATION FORM

INFORMATION TO BIDDERS DOWNLOADING THIS DOCUMENT

Bidders downloading this document from the Municipality of Lambton Shores website must register to be added to the Bidders list. Interested Bidders are required to complete the information below and return this form via fax or email to:

519-786-2135 or administration@lambtonshores.ca

Bidders who do not register may not receive any additional information or addendums relating to this project.

Bidder Registration Form	
Required Information	To be completed by Bidder
Company Name:	
Address:	
City:	
Contact Name:	
Phone Number:	
Fax Number:	
Email Address:	
Project No. / Name:	2019-16 Business Retention and Expansion Report and Action Plan

Return by fax to 519-786-2135 or by email to administration@lambtonshores.ca