



Request for Proposal

Regional Economic Development

Strategic Vision and a Governance Structure for
Implementation

West Parry Sound Economic Development Collaborative

Requested by:

West Parry Sound Economic Development Collaborative

9 James St

Parry Sound ON P2A 1T4

Issued October 28, 2022

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1.0 INTRODUCTION

As the gateway to Northern Ontario, the 7 municipalities that comprise West Parry Sound have a permanent population of 20,000, increasing to 150,000 with the influx of seasonal residents in the summer months. The area is home to almost 2000 businesses and 15,000 jobs, with major industries including manufacturing, tourism, and construction. Located within a UNESCO Biosphere and encompassing the 30,000 Islands and Georgian Bay coastline, the area has seen considerable economic growth in recent years, driven by the expansion of Highway 400 and the relocation of workers and businesses from urban centres driven by the COVID pandemic.

The West Parry Sound Economic Development Collaborative (WPSEDC) is a voluntary cooperative organization that provides economic development services to the seven municipalities in West Parry Sound District. Current members include the Township of Carling, the Municipality of McDougall, the Township of McKellar, the Town of Parry Sound, the Township of Seguin, the Township of The Archipelago, and the Municipality of Whitestone. Formed in 2017, the WPSEDC is mandated to build a supportive business environment using the area's strengths and pursuing collaborative economic development projects.

The WPSEDC currently employs a regional economic development officer (EDO), who provides day-to-day business assistance and supports the WPSEDC's four priorities of business retention and expansion, development readiness, investment attraction, and regional engagement.

To date, the operations of the WPSEDC have been funded through a Community Investment Initiative in Northern Ontario (CIINO) grant from FedNor and through contributions from member municipalities. FedNor funding and municipal commitments have historically been provided in 3 year terms. The current 3-year term of CIINO grant funding will end in December of 2023. The WPSEDC is looking to transition into a permanent, municipally funded entity and is embarking on a strategic planning project to determine the optimal approach to achieving this goal.

1.1 Invitation

The WPSEDC is seeking proposals for a qualified firm to prepare a high-level strategic vision for the Collaborative's future and conduct a governance review of present operations. The high-level strategic vision will provide a framework for providing sustainable regional economic development support in future years. The governance review will identify and propose a structure for the sustainable future operations of the WPSEDC, including funding, governance, and operational structures, and will make recommendations on how best to achieve the strategic vision.

1.2 Background Information

The West Parry Sound area has been serviced by several different economic development initiatives since 2007, of which the WPSEDC is the most recent. Under the WPSEDC, the area has been serviced by a regional economic development officer, provided for by grant funding from FedNor's CIINO program.

The WPSEDC is voluntary association between municipalities with a common interest in regional economic development. It was originally formed by five of the West Parry Sound municipalities, with additional members joining over the course of its operation. At present, all 7 West Parry Sound municipalities are members of the WPSEDC.

The WPSEDC received a second term of CIINO funding in 2020, funding a Regional Economic Development officer (EDO) from December 2020 to December 2023. The grant agreement budgeted \$405,000 for the salary, benefit, and travel expenses of the EDO over three years. Under the terms of the agreement, FedNor provided 71.67% of supported costs, to a maximum of \$290,250. Participating municipalities provided the remainder of funding through annual contributions to the WPSEDC, as outlined in the WPSEDC terms of reference. In addition to the costs of maintaining the EDO position, the grant application budgeted \$35,000 in program funding and \$15,000 of in-kind support from member municipalities and community partners.

Since December 2020, the WPSEDC has successfully implemented a business retention and expansion (BR+E) program, visiting and surveying over 150 area businesses. The WPSEDC provides additional assistance or follow-up to surveyed businesses, most commonly assisting with accessing funding or connecting with other support agencies. The WPSEDC also conducts regular familiarization tours for prospective investors in West Parry Sound. The WPSEDC also regularly engages with partner municipalities and other economic development supportive organizations to help improve the business environment in West Parry Sound.

With exception of the Town of Parry Sound, none of the member municipalities currently have an in-house economic development function. The Town of Parry Sound maintains a two-person economic development department in addition to their support for the regional initiative.

The current CIINO agreement ends in December 2023. As a result, the WPSEDC requires a new, sustainable funding and governance model to continue operating into and beyond 2024. The development of a new governance model also presents an opportunity for the WPSEDC to develop a long-term strategic direction for its future activities.

1.3 Services Required

Firms are to provide electronic copies of their proposal in PDF format, clearly identified as to the contents and addressed to:

James Cox, Regional Economic Development Officer

edo@investwps.com

c/o Township of The Archipelago

9 James Street

Parry Sound ON, P2A 1T4

Proposals must be received NO LATER THAN 4:00 pm EDT on Friday, November 18, 2022.

Proposals received after the above date and time will not be considered.

1.4 Costs Incurred by Proponents

All expenses incurred in the preparation and submission of proposals shall be borne by the Firm. No payment will be made for any proposals received, or for any other effort required of or made by the Firm prior to the commencement of work defined by the proposal approved by the WPSEDC.

1.5 Acceptance of Terms

All those who submit a proposal represent that they have read, completely understand, and accept the terms and conditions of this Request for Proposal (RFP) in full.

1.6 Clarification

All inquiries regarding this RFP are to be directed to the individual identified below. Inquiries must be received in writing or email no later than Wednesday, November 9, 2022 at 4:00 pm EDT. All inquiries received and the responses provided will be posted on the WPSEDC's website by way of written addendum(s), no later than Friday, November 11, 2022 at 4:00pm EDT without naming the source of the inquiry.

James Cox, Regional Economic Development Officer

edo@investwps.com

c/o Township of The Archipelago
9 James Street
Parry Sound ON, P2A 1T4

1.7 Terms of Payment

The successful Firm(s) shall be reimbursed upon satisfactory completion of the project within 30 business days.

1.8 Proposal Award

Proposals shall include pricing for the component parts identified in this RFP. The WPSEDC will consider all component parts of the proposal and will award the successful vendor at its sole discretion.

1.9 Follow-On Contracts

The WPSEDC reserves the right to award related work to the successful proponent, and fees for any follow-on contracts shall be based on the same unit or per diem rates proposed under this RFP, unless negotiated and approved otherwise.

2.0 TERMS OF REFERENCE

2.1 Minimum Requirements

The Firm certifies that it meets and shall maintain for the duration of the Project the following minimum requirements:

- Must have experience conducting strategic planning, governance review, and/or economic development strategies of similar size and scope;
- Must have experience working in a municipal environment;
- Must demonstrate the ability to work creatively with and balance the competing needs of key stakeholders;
- Must be able to demonstrate its ability to work flexibly and thoroughly with adequate resources;
- If the Firm intends to use any subcontractors, the response must demonstrate the applicable experience of subcontractor(s) per above. The Firm is responsible for liability insurance for anyone performing work; and
- The Firm will establish a project plan and execute against a projected timetable addressing the scope of work. Any deviation from the proposed project plan and timetable will require prior written consent of the WPSEDC Steering Committee Chair through the Regional Economic Development Officer.

2.2 Deliverables

The project will:

- Connect with all relevant stakeholders, including the Regional EDO, WPSEDC Steering Committee members, WPSEDC Board of Municipal Stakeholders;
- Review the existing structure, governance, and operations of the WPSEDC;
- Recommend a sustainable funding model for the future operations of the WPSEDC;
- Recommend a governance structure, taking into account the role of Councils and staff of member municipalities, including those that have existing economic development staff;
- Review and identify any needed improvements to WPSEDC operations; and
- Identify strategic priorities and high-level initiatives the WPSEDC can pursue in support of their mandate.

2.3 Contract Period

The project must be complete by May 30, 2023, including all invoicing.

3.0 EVALUATION CRITERIA

The successful Firm will possess the requisite technical skills to deal with the complex matters to be addressed in the scope of work and will be required to work directly with WPSEDC staff and stakeholders in a professional manner.

To achieve this, the WPSEDC is interested in a Firm, which in addition to sound technical qualifications, exhibits such skills as timeliness, diplomacy, tact, strong communication ability (both written and verbal) and an understanding of municipal culture and environment

The Firm must demonstrate:

- Skills necessary to carry out the scope of work;
- Management and communication skills; and,
- Experience in the development of broad-based plans.

3.1 Basis of Selection

WPSEDC staff intends to recommend the appointment of the successful Firm on the basis of best overall value, based upon a review of the technical and fee proposal.

3.2 Selection Criteria

Financial points will only be awarded to submissions that clearly meet the minimum requirements and have achieved a minimum score of 60 out of 80 points on the technical evaluation criteria. Proposals that do not meet this minimum score will be deemed non-compliant and will be given no further consideration.

A total of 100 points will be allocated to the proposal, as follows:

Category	Available Points
<i>Technical:</i>	
Qualifications and Experience of Firm	10
Qualifications and Experience of Team	15
Quality of Approach and Methodology	25
Demonstrated Understanding of Objectives	20
References	10
Subtotal	80
<i>Financial:</i>	
Cost	20
Total	100

Up to three (3) of the highest rated proposals may be invited by the WPSEDC to attend an interview to present and discuss their proposal. Interview details and evaluation criteria will be provided at the time of notification of request to attend an interview.

4.0 PROPOSAL SUBMISSION REQUIREMENTS

4.1 Qualifications and Experience of Firm

Provide a brief company profile and recent relevant experience. Provide three (3) similar implementations managed by the Firm. Provide client references for each of these projects.

4.2 Qualifications and Experience of Team

Provide the qualifications, recent relevant experience and responsibility of key team members, (sub-consultants and other staff), clearly stating the employment history of the Manager and key team members, years with current firm and work location.

4.3 Quality of Approach and Methodology

Describe the approach and methodology to be followed in supporting the WPSEDC's strategic vision and its implementation.

4.4 Demonstrated Understanding of Objectives

Describe the Firm's understanding of the assignment, including overall scope and objectives, noting any particular issues that may require specific attention.

4.5 Proposed Work Plan and Service Level Agreements

Provide a work plan and schedule to identify how the Firm will complete the assessment. Identify key indicators that will be used to ensure that work is measurable and that the expectations of the WPSEDC and the Firm are the same.

4.6 Fees

The Firm is to provide a maximum price, including all costs for sub-consultants and disbursements, but exclusive of HST, to provide the support in accordance with the services detailed herein of the Firm's proposal.

The breakdown of fees shall be presented in a table format identifying the level of effort that each team member allocates to each of the tasks in the proposed work plan, as well as disbursements for each task, if applicable.

All reasonable and proper expenses incurred by the Firm shall be reimbursed without any allowance thereon for overhead and/or profit. The following costs shall not be reimbursed:

- Communication expenses including internet, phone, and cellular charges; and
- Travel and living expenses unless identified in the proposal or approved in advance.

The Firm shall provide the per diem cost for any additional effort as a separate line item, should they be required.

4.7 Interviews

Firms may be required to make a presentation to discuss their methodology and approach to this service.

4.8 Insurance Commercial Liability

The Firm shall, at their expense, obtain and keep in force during the term of this agreement, Commercial General Liability Insurance satisfactory to the WPSEDC, written by an insurer licensed to conduct business in Canada and include, but not be limited to, the following:

- a) A limit of liability of not less than \$2,000,000 per occurrence;
- b) The policy shall contain a provision for cross liability in respect of the named insured;
- c) Non-owned automobile coverage with a limit of at least \$2,000,000 including contractual non-owned coverage; and
- d) Products and completed operation coverage (Broad Form) with an aggregate limit not less than \$2,000,000.

5.0 SPECIAL TERMS AND CONDITIONS

Submission of a proposal constitutes acknowledgement that the Firm has read and agrees to be bound by all the terms and conditions of the RFP.

The WPSEDC will not make any payments for the preparation of the response to the RFP. All costs incurred by a Firm in preparing a response to the RFP will be borne by the Firm.

This is not an offer. The WPSEDC does not bind itself to accept the lowest price proposal or any proposal submitted.

The WPSEDC has the right to cancel the Request for Proposal at any time and to reissue it for any reason whatsoever, without incurring any liability and no proponent will have any claim against the WPSEDC as a result of the cancellation or re-issuing of the Request for Proposal.

The Firm acknowledges that the WPSEDC shall have the right to reject any, or all, Proposals for any reason, or to accept any Proposal which the WPSEDC in its **sole unfettered discretion** deems most advantageous to itself. The lowest, or any, Proposal will not necessarily be accepted and the WPSEDC shall have the unfettered right to:

- Accept a non-compliant Proposal;
- Accept a Proposal which is not the lowest Proposal; and/or
- Reject a Proposal that is the lowest Proposal even if it is the only Proposal received.

The WPSEDC reserves the right to consider, during the evaluation of Proposals:

- Information provided in the Proposal document itself;
- Information provided in response to enquiries of industry references set out in the Proposal;
- Information received in response to enquiries made by the WPSEDC of third parties apart from those disclosed in the Proposal in relation to the reputation, reliability, experience and capabilities of the Firm;
- The manner in which the Firm provides services to others;
- The experience and qualification of the Firm's senior management, and project management;
- The compliance of the Firm with the WPSEDC's requirements and specifications; and
- Innovative approaches proposed by the Firm in the Proposal.

The Firm acknowledges that the WPSEDC may rely upon the criteria which the WPSEDC deems relevant, even though such criteria may not have been disclosed to the Firm. By submitting a Proposal, the Firm acknowledges the WPSEDC's rights under this Section and absolutely waives any right, or cause of action against the WPSEDC,

by reason of the WPSEDC's failure to accept the Proposal submitted by the Firm, whether such right or cause of action arises in contract, negligence, or otherwise.

If a contract is to be awarded as a result of the RFP, it will be awarded to the proponent whose proposal, in the WPSEDC's opinion, provided the best potential value to the WPSEDC and is capable in all respects to fully perform the contract requirements and the integrity to assure performance of the contract obligations based on the objective assessment outlined above.

If the WPSEDC decides to award a contract or contracts based on a submission received in response to this RFP, the successful Firm will be notified of the intent to award in writing, and the subsequent execution of a written agreement shall constitute the making of a contract. Proponents will not acquire any legal or equitable rights or privileges whatsoever until the contract is signed by both parties.

In the event of any inconsistency between the RFP and the contract, the contract shall govern.

The WPSEDC reserves the exclusive right to determine the qualitative aspects of all Proposals relative to the evaluation criteria. Unsuccessful proponents will be provided with a verbal debriefing on the evaluation of their submission after the selection process has been completed.

Proponents may not amend or withdraw their proposals after the closing date and time.

Proposals will be evaluated as soon as practicable after the closing time.

The proposals and accompanying documentation submitted by the proponent are the property of the WPSEDC and will not be returned.

Proponents are advised that all communications with the WPSEDC related to this RFP during the bidding process must be directly and only with the individual nominated in Section 1.3.