

HALIFAX REGIONAL MUNICIPALITY

REQUEST FOR PROPOSALS FOR

Regional Museum Strategy Phase 1

RFP Number:19-013

Date Issued:1/30/2019

**Deadline Proposals: 2:00pm Local Time
2/14/2019**

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1. PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

1.1. INVITATION TO PROPONENTS

This Request for Proposals (“RFP”) is an invitation by Halifax Regional Municipality (“HRM”) to prospective proponents to submit proposals for the provision of Phase 1 of the Municipal Museum Strategy, as further described in the RFP Deliverables.

1.2. RFP CONTACT

For the purposes of this procurement process, the “RFP Contact” shall be:

Name/Title	Stephen Terry, Sr. Procurement Consultant
Email address	terryst@halifax.ca

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials or other representatives of HRM, other than the RFP Contact or their designates, concerning matters regarding this RFP. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent’s proposal.

1.3. TYPE OF CONTRACT FOR DELIVERABLES

The selected proponent will be required to enter into an agreement with HRM for the provision of the Deliverables in the form attached as Appendix B to this RFP (the “Agreement”).

1.4. RFP TIMETABLE

Issue Date of RFP	1/30/2019
Deadline for Questions	2/6/2019
Submission Deadline Date and Time	2/14/2019

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

1.5. SUBMISSION OF PROPOSALS

1.5.1. Proposals to be submitted at Prescribed Location

Proposals shall be delivered to the following address:

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

Ensure the external packaging is marked with the RFP number and proponent's contact information. ***Canada Post, Express Post and Priority Post do not deliver to the above address.***

1.5.2. Proposals to be submitted on Time

Proposals must be submitted at the location set out above on or before the Submission Deadline. Proposals submitted after the Submission Deadline will be rejected. HRM's time clock will be assumed to be correct.

1.5.3. Proposals to be submitted in Prescribed Format

A) In a sealed package, Proponents should submit their proposal containing the following:

Include one (1) hard copy of the technical proposal and one (1) electronic copy of the technical proposal saved as a PDF on a USB flash drive, unless otherwise indicated.

Technical proposal packages should be prominently marked as "Technical Proposal" with the RFP title and number (see RFP cover) and the full legal name and return address of the proponent. The file name on the electronic copy for the technical proposal should include an abbreviated form of the proponent's name and RFP #.

Technical proposals should be comprised of:

- (a) completed Appendix D - Proposal Submission Form,
- (b) completed response to the RFP requirements and deliverables, and
- (c) other mandatory submission requirements, as applicable.

Financial information is not to be included in the technical proposal. Label the USB flash drive with the proponent's name and RFP #.

B) In a sealed envelope which should be included in the sealed package, include one (1) hard copy of the cost proposal (completed response to Appendix C – Cost Proposal Submission Requirements) and one (1) electronic copy of the cost proposal saved as a PDF or MS Excel on a USB flash drive.

Cost proposal envelopes should be prominently marked as "Cost Proposal" with the RFP title and number (see RFP cover) and the full legal name and return address of the proponent. The file name on the electronic copy for the cost proposal should include an abbreviated form of the proponent's name and RFP #. Label the USB flash drive with the proponent's name and RFP #.

If there is a conflict or inconsistency between the hard copy and the electronic copy of the proposal, the hard copy of the proposal shall prevail. In the interest of sustainability, please refrain from using binders, binding, plastic covers, or similar fastening or presentation materials when submitting the proposal. Similarly, unless specifically requested in this solicitation document, proponents should not submit product catalogues, swatches, or other marketing materials with their proposal.

HRM will not accept proposals submitted by facsimile transfer, email, or any other electronic means.

1.6. AMENDMENT OF PROPOSALS PRIOR TO SUBMISSION DEADLINE

Proponents may amend their proposals prior to the Submission Deadline by submitting the amendment in a sealed package prominently marked with the RFP title and number and the full legal name and return address of the proponent to the location set out above. Any amendment should clearly indicate which part of the proposal the amendment is intended to amend or replace. Any amendment received after the Submission Deadline will not be accepted.

1.7. WITHDRAWAL OF PROPOSALS

Proponents may withdraw their proposals prior to the Submission Deadline. To withdraw a proposal, a notice of withdrawal must be sent to the RFP Contact prior to the Submission Deadline and must be signed by an authorized representative of the proponent. HRM is under no obligation to return withdrawn proposals.

1.8. PROPOSALS IRREVOCABLE AFTER SUBMISSION DEADLINE

Proposals shall be irrevocable for a period of **ninety (90)** days from the Submission Deadline.

[End of Part 1]

2. PART 2 – EVALUATION OF PROPOSALS

2.1 STAGES OF EVALUATION

HRM 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 be disqualified and not evaluated further. The Mandatory Submission Requirements are as follows:

2.2.1. Technical Proposal

Each proposal must include (a) completed Proposal Submission Form (Appendix D), (b) completed response to the RFP Requirements and Deliverables, and (c) other mandatory submission requirements, as applicable.

The Proposal Submission Form (Appendix D) must be completed and signed by an authorized representative of the proponent. Other than inserting the information requested, a proponent may not make any changes to the Form. Any proposal containing any such changes, whether on the face of the form or elsewhere in the proposal, will be disqualified.

2.2.2. Cost Proposal

Each proposal must include an envelope marked “Cost Proposal”. The Cost Proposal envelope will not be opened until Stage III.

2.3. STAGE II – TECHNICAL EVALUATION

Stage II will consist of an evaluation of Technical Proposals in the following two sub-stages:

2.3.1. Mandatory Technical Requirements

HRM will review the proposals to determine whether the Mandatory Technical requirements as set out herein have been met. Proposals that do not comply with all of the Mandatory Technical requirements will be disqualified and not evaluated further.

2.3.2. Rated Criteria

HRM will evaluate each compliant proposal on the basis of the rated criteria as set out in Section 4 of the RFP Particulars (Appendix A). Proposals that fail to meet the stated threshold(s) will be disqualified and not evaluated further.

2.4. STAGE III – PRICING

Stage III will consist of a scoring of qualified Cost Proposals as follows:

2.4.1. Opening of Cost Proposals

HRM will open Cost Proposals to ensure that they are completed in accordance with the Cost Proposal Submission Requirements (Appendix C). Cost proposals that are not completed in accordance with the Cost Proposal Submission Requirements will be disqualified and not evaluated further.

2.4.2. Errors and Discrepancies

If Cost Proposals contain mathematical errors, unit prices/hourly rates will be assumed correct for each line item and used to quantify the total cost based on the estimated quantities.

2.4.3. Allocation of Cost Points

The proposal with the lowest cost shall receive the maximum points allocated for cost. All other proposals will be prorated against the lowest cost proposal using the following formula:

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

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

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

Bid 1: \$100,000

Bid 2: \$130,000

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

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

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

2.5. STAGE IV – CONDITIONS OF AWARD

After the completion of Stage III, all scores from Stage II and Stage III will be added together.

If any documents required to be submitted are not submitted within the required timeframe by HRM, HRM may withdraw the selection of that proponent and proceed with the selection of another proponent or cancel the RFP Process. **Proponents are encouraged to submit these documents with proposal submission.**

2.6. STAGE V - SELECTION OF HIGHEST SCORING PROPONENT

Subject to the terms and conditions of the RFP process set out in Part 3 of this RFP, including HRM's right to reject all proposals, the proponent with the highest score, and that meets the conditions of award, will be selected to enter into the Agreement (Appendix B). The selected proponent will thereafter be referred to as "the Supplier".

3. 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 B, either as part of its proposal or after receiving notice of selection, may be disqualified by HRM in HRM's absolute discretion.

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. Language

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 form, 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. References and Past Performance

In the evaluation process, HRM may include information provided by the proponent's references and may also consider the proponents' past performance or conduct on previous contracts with HRM.

3.1.6. Information in RFP Only an Estimate

HRM makes 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 shall bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or presentations.

3.1.8. Proposal to be retained by HRM

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

3.1.9. Trade Agreements

Proponents should note that procurements falling within the scope of Chapter 5 of the Agreement on Internal Trade and/or the Atlantic Procurement Agreement are subject to those trade agreements but that the rights and obligations of the parties shall be

governed by the specific terms of this RFP.

3.1.10. No Guarantee of Volume of Work or Exclusivity of Contract

HRM 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. HRM may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services from HRM's own resources.

3.1.11. Business Registration

Proponents may be required to be registered to carry on business in accordance with applicable laws. For information on the business registration requirements of the Nova Scotia Registry of Joint Stock Companies, please consult:

<http://www.novascotia.ca/snsmr/access/business/registry-joint-stock-companies.asp>

The status of a proponent's business registration does not preclude the submission of a proposal in response to this RFP. A proposal can be accepted for evaluation, regardless of (i) whether the company is registered, or (ii) whether its business registration is in good standing. However, a contract cannot be awarded unless the successful proponent is registered and in good standing, in accordance with applicable laws.

If the proponent's business is not required to register in Nova Scotia, the proponent will be required to submit registration from their applicable jurisdiction.

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 by email to the RFP Contact on or before the Deadline for Questions. All questions or comments must be submitted by proponents by email to the RFP Contact. All questions or comments should be submitted by proponents on or before the Deadline for Questions. HRM is not obligated to respond to questions or comments received after this period has passed. No such communications are to be directed to anyone other than the RFP Contact.

HRM is under no obligation to provide additional information, and HRM shall not be responsible for any information provided by or obtained from any source other than the RFP Contact. It is the responsibility of the proponent to seek clarification from the RFP Contact on any matter it considers to be unclear. HRM is not 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 HRM, for any reason, determines that it is necessary to provide additional information relating

to this RFP, such information will be communicated by addendum on the Nova Scotia Procurement Web Portal. 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 HRM. In the Proposal Submission Form (Appendix D), proponents should confirm their acknowledgement of all addenda by setting out the number of each addendum in the space provided.

3.2.3. Post-Deadline Addenda and Extension of Submission Deadline

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

3.2.4. Verify and Clarify

During the evaluation process, HRM may request further information from the proponent or third parties in order to verify and/or clarify the information provided in the proponent's proposal. The response received by HRM shall form an integral part of the proponent's proposal.

3.3. EXECUTION OF AGREEMENT, NOTIFICATION AND DEBRIEFING

3.3.1. Selection of Proponent and Execution of Agreement

HRM will notify the selected proponent in writing. The selected proponent shall execute the Agreement in the form attached as Appendix B to this RFP and satisfy any other applicable conditions of this RFP within ten (10) days of notice of selection.

3.3.2. Failure to Enter into Agreement

In addition to all of HRM's other remedies, if a selected proponent fails to execute the Agreement or satisfy any other applicable conditions within ten (10) days of notice of selection, HRM may, in its sole and absolute discretion and without incurring any liability, withdraw the selection of that proponent and proceed with the selection of another proponent or cancel the RFP Process.

3.3.3. Posting of Contract Award

Once an Agreement is executed by HRM with a proponent, notification of the outcome of the procurement process will be posted on the Nova Scotia Procurement Web Portal.

3.3.4. Debriefing

Proponents may request a debriefing after posting of the outcome of the procurement process on the Nova Scotia Procurement Web Portal in accordance with section 46 of HRM's Procurement Policy (Administrative Order 2016-005-ADM). All requests must be in writing to HRM's Manager of Procurement and must be made within ten (10) days of posting of the outcome of the procurement process on the Nova Scotia Public Tenders web portal. The intent of the debriefing information session is to aid the proponent in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process or its outcome.

3.3.5. Supplier Complaint Procedure

If a proponent wishes to file a complaint in regards to the RFP process, it must provide written notice to HRM's Manager of Procurement within ten (10) days of posting of the outcome of the procurement process on the Nova Scotia Procurement Web Portal, and HRM will respond in accordance with the Bidder Complaint Procedure set out in

Appendix “C” of HRM’s Procurement Policy (Administrative Order 2016-005-ADM).

3.4. CONFLICT OF INTEREST AND PROHIBITED CONDUCT

3.4.1. Conflict of Interest

HRM may disqualify a proponent for any conduct, situation or circumstances, determined by HRM, in its sole and absolute discretion, to constitute a Conflict of Interest. For the purposes of this Section, “Conflict of Interest” has the meaning ascribed to it in the Proposal Submission Form (Appendix D).

3.4.2. Disqualification for Prohibited Conduct

HRM may disqualify a proponent, or terminate an Agreement entered into if HRM, in its sole and absolute discretion, determines that the proponent has engaged in any conduct prohibited by this RFP.

3.4.3. Prohibited Proponent Communications

A proponent shall 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 Proposal Submission Form (Appendix D).

3.4.4. No Lobbying

A proponent shall 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.

3.4.5. Illegal or Unethical Conduct

Proponents shall not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion. Proponents shall 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 HRM; 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.

3.4.6. Rejection of Proposal

HRM may reject a proposal based on past performance or based on inappropriate conduct, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the Contractor to honour its submitted pricing or other commitments;
- (c) any conduct, situation or circumstance determined by HRM, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest; or
- (d) HRM’s past experience with the proponent for similar or related services.

3.5. CONFIDENTIAL INFORMATION

3.5.1. Confidential Information of HRM

All information provided by or obtained from HRM in any form in connection with this RFP

either before or after the issuance of this RFP

- (a) is the sole property of HRM 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 Agreement for the Deliverables; and
- (c) must not be disclosed without prior written authorization from HRM.

3.5.2. Confidential Information of Proponent

In accordance with the *Public Procurement Act*, the name of the proponents and the name and total value of the successful proponent will be publicly advertised on the Nova Scotia Public Tenders web portal.

The Municipality is subject to the Freedom of Information and Protection of Privacy provisions contained within the *Municipal Government Act* at Part XX. Any document submitted to the Municipality in response to this RFP is subject to this legislation and proponents should be aware that any member of the public is entitled to request a copy of the document. In response to such a request, the Municipality may be required to disclose some or all of the information in accordance with the criteria set out in the legislation, including sections 462, 480 and 481(1).

3.5.3. Personal Information International Disclosure Protection Act

The *Personal Information International Disclosure Protection Act* (PIIDPA), creates obligations for the Government of Nova Scotia and its service providers when personal information is collected, used or disclosed. Provisions related to PIIDPA requirements are included in the contract terms. A copy of the Act is available online at:

<http://nslegislature.ca/legc/statutes/persinfo.htm>

3.5.4. Privacy Protection Schedule

The successful proponent is required to comply with the Privacy Protection Schedule attached to the Agreement (Appendix B)

3.6. RESERVED RIGHTS, LIMITATION OF LIABILITY AND GOVERNING LAW

3.6.1. Reserved Rights of HRM

HRM reserves the right to:

- (a) make public the names of any or all proponents;
- (b) request written clarification in relation to a proponent's proposal;
- (c) waive minor formalities that do not constitute Mandatory Submission requirements or Mandatory Technical requirements;
- (d) verify with any proponent or with a third party any information set out in a proposal;
- (e) check references other than those provided by any proponent;
- (f) disqualify any proponent whose proposal contains misrepresentations or any other inaccurate or misleading information;
- (g) disqualify any proponent or the proposal of any proponent who has engaged in conduct prohibited by this RFP;
- (h) amend this RFP process without liability at any time prior to the execution of a written agreement between HRM and a proponent. These changes are issued by way of addendum in the manner set out in this RFP;
- (i) cancel this RFP process without liability at any time prior to the execution

of a written agreement between HRM and a proponent. A cancellation is communicated by way of addendum in the manner set out in this RFP. HRM may in its sole discretion issue a new RFP for the same or similar Deliverables; or

- (j) 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. Past Litigation with HRM

HRM may, in its absolute discretion, reject a Proposal submitted by a Proponent if:

- (a) the Proponent, or any officer or director of the Proponent;
- (b) any related company of the Proponent through common ownership, control or otherwise; or
- (c) any intended sub-contractor of the Proponent;

is or has been engaged, either directly or indirectly through another corporation, in a legal action (including arbitration or the service on HRM of formal notice of intent to commence a legal action) against HRM, its elected or appointed officers and employees in relation to (i) any other contract with HRM; or (ii) any matter arising from HRM's exercise of its powers, duties, or functions under the *Halifax Regional Municipality Charter* or another enactment; within five years of the date of this Request for Proposals.

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

3.6.3. Limitation of Liability

By submitting a proposal, each proponent agrees that:

- (a) neither HRM nor any of its employees, officers, agents, elected or appointed officials, advisors or representatives will be liable, under any circumstances, for any claim, loss or damage 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;
- (b) the proponent irrevocably 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 HRM's decision to not accept the proposal submitted by the proponent, to enter into an agreement with any other supplier or proponent (including a non-compliant proponent) or to cancel this RFP process; and
- (c) in the event that a court of competent jurisdiction determines that (a) and/or (b) is inapplicable or unenforceable, HRM's liability in such circumstances shall be limited to the lesser of \$5,000 and the proponent's costs of preparing its proposal.

3.6.4. Governing Law and Interpretation

These Terms and Conditions of the RFP Process:

- (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 HRM; and
- (c) are to be governed by and construed in accordance with the laws of the province of Nova Scotia and the federal laws of Canada applicable therein.

[End of Part 3]

APPENDIX A – RFP PARTICULARS

1. THE DELIVERABLES

The Municipality is seeking proposals on the delivery of Phase 1 of the Halifax Regional Municipality Regional Museum Strategy. This is a multi-phased strategy.

This Phase 1 shall deliver:

- A comprehensive written report on the current state of affairs pertaining to museum models in the Municipality to identify existing gaps and redundancies in the Regional museum system; including but not limited to:

The critical examination of exhibits, collections, programs, outreach materials and websites, interpretive themes, visitor experience, visitation numbers, operational and programming budget, levels and methods of financial and in-kind support (municipal and non- municipal) in a variety of museum delivery practices in HRM.

SECTION 1:

Municipally-Owned Heritage Collections, Museums and Operational Models

- Written overview of Municipally owned heritage buildings currently operating as community museums with history of sites, current agreements and staff resources:
 - a) Scott Manor House, operated by the Fort Sackville Heritage Society;
 - b) Evergreen House and Quaker House, operated by Dartmouth Heritage Museum Society.
- Critically examine the “Municipal Archives Artifact Collection (i.e. gifts to Mayor/Regional Councillors). Description of service levels, mandate, current staff, storage and resource levels.
- Critically examine Municipally-owned artifact collections. Analysis to include scope and size of collection, overview of material and storage capacity and curatorial focus. The collection and interpretive analysis should align with the Nova Scotia Museum Interpretive Master Plan interpretive conceptual themes (Forming, Living, Relating, Exploiting and Evolving):
 - I. The collection formally known as the *Dartmouth Heritage Museum collection*;
 - II. The collection formally referred to as the *Civic Collection*, which is currently comprised of artifacts acquired by the HRM Archives and is renamed *the Municipal Archives Artifact Collection*.
 - III. The collection formally referred to as the *Civic Collection*, which is currently comprised of artifacts identified in a 1996 inventory and located in numerous Municipal buildings.

- IV. Summary of current HRM Archives collection.
- V. The collections acquired and managed by the *Halifax Regional Police* and the *Halifax Fire Department*. Summary to include scope and size of collection, overview of material and storage requirements and curatorial focus.
- VI. Analysis of current storage capacity in which HRM-owned artifact collections are located to evaluate potential for sustainability and growth with analysis of required human resource levels.

Summary of Municipal Support to Non-Municipally owned museums and collections (2016 – 2019)

- Tax exemption program for heritage buildings that operate as museums.
- Community Grant program funding to museum-based heritage groups.
- Interim Museum Funding Program. **This is a new funding program governed by Administrative Order 2018-010-ADM. The program provides operational and special project funding for community museums located in HRM; and
- Other, as required by HRM.

SECTION 2:

Statistical Overview of Non-Municipally Owned Museum Visitor Experience with Economic Impact

- Mapping of all museums located in HRM (as defined and approved by HRM staff).
- Summary of overall visitation numbers to museums in HRM 2016, 2017 and 2018.
- Overall visitor spending as pertains to museums and economic impact in HRM.
- Comparative analysis of current municipal financial support for museums with 3 municipalities in Canada to illustrate level of spending and impact.

Overview and Summary of Regional new and/or planned cultural sites and exhibits

- Art Gallery of Nova Scotia and Nova Scotia College of Art and Design
- Mi'kmaq Friendship Centre
- Discovery Centre
- Citadel Hill (recent exhibit enhancements)
- Identify potential opportunities for temporary public display/exhibit of HRM-owned collections, with overview of required resources and risks.

Comparative Analysis of Museums in Canada

- Overview of governance models in HRM-based museums – provincial, federal, community-based;

- Comparative analysis of current HRM operational museum support/model with 3 municipal museum operational models in Canadian cities to illustrate how other municipalities own, support and /or manage museums;
 - Comparative analysis of HRM Municipal Archives with 3 Municipal Archives in Canadian cities to illustrate models of operation, scale, location, resource requirements, scope and opportunities for exhibitions and interpretive programming;
 - Comparative chart with overview of examples of municipal or civic-operated museums in Canada with building size and description, staff resources and operational costs;
 - Summary of latest museum builds in Atlantic Canada – Discovery Centre, Halifax, Nova Scotia; Resurgo, Moncton, New Brunswick; and the New Brunswick Museum, St. John, New Brunswick to include project lifecycle and stage gateways from concept to close out, budget, operational model and required staffing and operational resources;
 - Summary of latest trends in museums in Canada.
- *** The same 3 Canadian Cities should be used in all comparative analysis work.

SECTION 3:

Interpretive Overview of Community, Provincial and Federal Museums located within HRM

- Interpretive analysis to align with the Nova Scotia Museum Interpretive Master Plan interpretive conceptual themes (Forming, Living, Relating, Exploiting and Evolving);
 - Description of museum sites to include general overview of site to include: buildings, location, years of operation, seasonal operation, staffing levels) budget, collection overview, methods of interpretation, overview of visitor experience; community outreach and impact.
1. **Federal Sites:** National Museum of Immigration at Pier 21 (Canadian Heritage) and Citadel National Historic Site (Parks Canada);
 2. **Provincial Sites:** Nova Scotia Museum of Natural History, Maritime Museum of the Atlantic (Nova Scotia Museum), Nova Scotia Sports Hall of Fame and the Black Cultural Centre for Nova Scotia;
 3. **Community Museums:** Acadian House Museum, Africville Heritage Trust, Atlantic Aviation Museum, The Army Museum, Canadian Naval Memorial HMSC Sackville, Cole Harbour Heritage Farm, Fultz House, Hooked Rug Museum of Nova Scotia; Memory Lane Heritage Village, Moose River Gold Mines, Naval Museum of Halifax and Shearwater Aviation Museum (Canadian Armed Forces Museums), Spryfield Urban Farm Museum; and Waverley Heritage Museum.

SWOT Analysis of the Collective Interpretive and Visitor Experience for all HRM-based museums as identified by HRM

- Analyse, identify and develop recommendations regarding specific gaps and strengths in current and collective interpretation methods, programming, visitor experience and exhibits. Recommendations to align with the *Nova Scotia Museum Interpretive Master Plan*.

SECTION 4:

Summary of the research and analysis. Recommendations and next steps for the Phase 2, including but not limited to options for feasibility study and models for further study and/or implementation. A minimum of two drafts of to be submitted to HRM project manager for review and proponent revision prior to final report submission.

PROJECT BACKGROUND:

Background:

Halifax Regional Municipality is home to over 20 community museums, two federal museums and two provincial museums, in addition to a vast network of heritage groups, designated heritage buildings and national historic sites, events and people. In the past the Municipality has offered operational and financial support to museums in a variety of methods and levels.

For this project, a museum is defined as:

“a non-profit permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purpose of education, study and enjoyment” (ICOM Statutes, 2007).

Halifax Regional Municipality currently owns three historic building that operate solely as museums and are operated by two different not-for-profit societies:

Dartmouth Heritage Museum

In 1964, the Dartmouth Museum Society was formed. The Society collected artifacts and were instrumental in developing the Dartmouth Heritage Museum. In 1967, the Dartmouth Heritage Museum (DHM) was opened as a Centennial project. The museum was located at 100 Wyse Road, in the former Dartmouth City Hall building and was operated as a municipal museum for Dartmouth. Staff were employed by the City and all artifacts collected by the museum were considered municipal assets.

In the 1970's, the DHM acquired two additional buildings: Quaker House, 57 Ochterlony St., Dartmouth and Evergreen House, 26 Newcastle St., Dartmouth. In addition to those buildings, some artifacts were stored in the old Greenvale School. The collection grew to over 40,000 artifacts, some of these purchased but most donated. The collection mostly pertains to Dartmouth heritage and history, with some artifacts having broader provenance and in other cases, no provenance at all.

At the time of amalgamation, the museum, the buildings and the collection came under the control of the Halifax Regional Municipality. This change in status was defined through a management agreement with HRM and the sites were managed by the Dartmouth Heritage Museum Society Board (DHMS).

In 2002, the Wyse Road building was deemed beyond reasonable repair and was demolished. The collection (located in numerous off-site facilities) was consolidated and moved to its current warehouse location. The DHMS has continued to operate Quaker House and Evergreen House as museums and managed the artifact collection in storage.

A 2013/14 RFP requested consulting services for the unpacking, stabilizing and inventorying of the artifact collection. This project, “Phase 1 Artifact Collection” was completed in 2015. Phase 2 of the Artifact Collection is ongoing, focussed on refining and rationalizing of the collection conducted through curatorial review.

In 2016, a new management agreement was signed between the DHMS and HRM, with clarification on roles and responsibilities.

Scott Manor House, 15 Fort Sackville Rd., Bedford, NS

Scott Manor House is a registered heritage house (1770’s) that was purchased by the Town of Bedford prior to amalgamation. Since the early 1990’s, it has been operated as a museum by the Fort Sackville Society. It has a small collection of artifacts that are entirely owned by the Society, with a smaller collection of municipal artifacts pertaining to Bedford, that are owned by HRM.

In 2018, the Society signed a new lease agreement that outlines requirements for the operation of the Scott Manor House. Unlike the DHMS agreement, the lease agreement does not require reporting or stipulate how the Fort Sackville Society functions in their museum-related activities.

Regional Council Reports and Direction – Timeline for the Regional Museum Strategy:

Beginning in 2009, Halifax Regional Council directed staff to review the state and future of the Dartmouth Heritage Museum (Society). Many of the motions and subsequent staff reports centred on finding a new home for the Dartmouth Heritage Museum. Between 2009 and 2011, 90 Alderney Drive, the former Dartmouth City Hall was considered as a potential site.

In 2011, CBCL conducted a thorough feasibility study to determine suitability of the location as the new Dartmouth Heritage Museum. That report deemed the site inappropriate for a museum and in 2014, Council approved the sale of 90 Alderney Drive through Administrative Order 50. In 2017, a staff report provided information and update on the collection work to date.

Cultural Heritage Priorities Plan:

The 2014 Regional Plan directs the development of a Culture and Heritage Priorities Plan (CHPP) and outlines two major phases for this project; Phase 1 Inventory and Phase 2 Analysis and Prioritization. The Municipality is currently in the midst of its Culture and Heritage Priorities Plan, and the process is scheduled for completion in 2019. Part of the current consideration regarding overall scope of the Plan includes the assessment of current municipal programs including:

Cultural Facilities – spaces and places that increase access to culture and foster creativity; and
Living Heritage – traditions, memories, experiences, objects and places recognising a sense of community and belonging.

This work will include policy consideration of municipal support through its sub set “Cultural Spaces Plan”, of which the Regional Museum Strategy is the first initiative. The outcomes of the Regional Museum Strategy in addition to the mapping of cultural facilities undertaken in the CHPP will provide evidence based metrics to identify gaps and next steps for municipal support as directed by the July, 2014 Council motion: “Develop a Cultural Spaces plan through a consultation, through the municipality’s Arts Halifax committee, that includes other stakeholders

and public engagement, and that shall include completion of a needs assessment, feasibility studies and identify potential partners and service delivery models that may include new cultural spaces and/or recapitalization of existing facilities”.

Regional Museum Strategy and Collections Rationale

On March 22, 2016 Regional Council directed the development of a regional museum strategy and a supporting regional collection rationale. As outlined in the March 16, 2016 Recommendation Report “*Dartmouth Heritage Museum Society Request for Management Agreement and Funding*”. The associated actions of that motion, as they pertain to the Regional Museum Strategy include:

2. Outlines a plan to work with stakeholders, including the Board of DHMS, to determine the size and scope of a municipal museum;
3. Outlines the next steps in the completion of a municipal museum including allocation of capital funding and how it relates to the Cultural and Heritage Priorities Plan outlined in the January 28th motion and the subsequently requested Cultural Spaces Plan;
4. Explains the relationships with and impact to other museums in HRM;
5. Outlines potential short-term options, including opportunities for displaying the artifacts;
6. Outlines potential cost sharing and fundraising opportunities.

A: Goal

Phase 1 of the Regional Museum Strategy will provide a robust and thorough overview of the current state of both HRM-owned and non HRM-owned museums located within the municipality, with a summary of interpretive themes and visitor experiences. The comparative analysis research will position HRM’s current role, delivery and operational model compared to other municipalities in Canada. The statistical analysis will describe HRM’s current level of funding and economic impact as compared to other municipalities in Canada.

The key outcomes of this Phase 1 report are:

- A background on the history of the HRM-owned legacy museums and collections. A concise and clear description of the collection and interpretive themes that is aligned with the Nova Scotia Museum Interpretive Master Plan.
- A concise and clear description of existing HRM-based museums, their collections and interpretive themes that is aligned with the Nova Scotia Museum Interpretive Master Plan.
- A SWOT overview of gaps and strengths of all HRM-based museum interpretation, visitor experience and programming (sites to be identified by HRM).
- A review of latest and planned HRM-based museums and cultural facilities, with summary of potential scale, scope, budget and operational resources.
- Identification of potential opportunities for short-term and temporary exhibit space with summary of required resources, staffing implications, infrastructure needs and risks. Provide examples of other municipal models utilizing temporary or “pop-up” exhibits and programming.
- An overview of the scale and scope of the recent and new museum builds: Discovery Centre, Halifax, Nova Scotia; the New Brunswick Museum, Saint John, New Brunswick;

and Resurgo, Moncton, New Brunswick that includes timeline, scale and scope, budget, fund-raising and levels of funding, operational resources, etc.;

- An overview and statistical analysis of the visitor experience and economic impact of museums in HRM;
- Recommendations and next steps for Phase 2 the Regional Museum Strategy.

B: OBJECTIVES/CRITICAL PATH

The Municipality anticipates the development of the Phase 1 Regional Museum Strategy Report and all key deliverables to take approximately 9 months to complete.

The following action list and critical path outlines in general terms the steps and major milestones considered to be necessary to meet the goals of the contract:

1. Project Initiation.
2. Preliminary meeting(s) with key HRM stakeholders, as identified by HRM Project Manager.
3. Meetings with identified HRM-based museums with summary of findings of interpretive themes.
4. Regular meeting with HRM Project Manager and staff with summary and updates provided.
5. Present draft(s) of findings for review.
6. Statistical and comparative analysis.
7. Identify next steps and recommendations for subsequent phasing.
8. Final draft for review, revisions and report preparation.
9. Final report submission.

The following are milestone dates that the Municipality considers critical for the project and are to be addressed in the proponent's proposed schedule and work plan:

Activity	Milestone Dates
First Key Stakeholder Meeting – Kick-off for project	Within 2 weeks of award of contract
First Preliminary meetings with HRM-identified stakeholders	
Draft of findings for review	
Statistical and comparative analysis for review	
Final revisions and report preparation	
Final Report	November 31, 2019

C. REQUIREMENTS

Mutual Planning

The lead business unit is Parks and Recreation. The HRM Project Manager (PM) will identify other museum stakeholders and will facilitate meetings with those identified groups.

HRM Project Manager will also facilitate delivery of background reports and information for the proponent. Much of this work has been completed or is in progress. It is anticipated that HRM staff from other business units will be available for meetings and to provide required information.

D. CONSTRAINTS:

- This project has a time constraint to deliver all actions listed in the critical path and body of the deliverables by November 31, 2019.
- The Phase 1 Regional Museum Strategy Report scope is defined and narrow. This is not a museum feasibility or operational planning exercise. Outcomes and ideas related to topics outside of this scope may be captured through meetings with stakeholders.
- The Regional Museum Strategy is limited to sites that HRM define as a museum. Other institutions such as privately held collections, art galleries, visitor centres, institutional collections, heritage and cultural societies and private museums are excluded from this scope of work.
- Museum sites that are seasonal operations may not be available for meetings. In that case, the proponent will inform HRM PM for further direction.
- Access to the HRM Collection databases are restricted, however, limited access will be provided to proponent. Access to any HRM artifacts in storage will also be coordinated upon request.
- There is sensitivity around the security of all artifact collections. Proponent will abide by terms of confidentiality and avoid disclosing sensitive information pertaining to monetary value of collections and associated storage.

E. ASSUMPTIONS:

The following assumptions have been made with regards to this project:

- That HRM intends to form a group of external stakeholders, comprised of representatives from HRM-based museums to be engaged and provide information for this project. If this group is not formalized, the identified stakeholders will need to be consulted with on an individual basis. The Central Regional Heritage Group is a formalized stakeholder group, however, not all HRM-based museums attend, so it is not a comprehensive group.
- That HRM intends to form a group of internal staff stakeholders, comprised of representatives from HRM business units to be engaged and provide information for this project. If this group is not formalized, the identified stakeholders will need to be consulted with on an individual basis.
- That much of the data collection is readily available, including 2017/18 MBNCanada cultural benchmarking data, Community Grants program awards, etc. and will be provided to the proponent. HRM staff will facilitate the project by providing required information and be reasonably available for meetings with proponent. In other cases, the statistical information is available through other government agencies.
- That the Phase One Regional Museum Strategy will inform next steps in the Regional Museum Strategy that are phased and broadly costed.

F. PROJECT FRAMEWORK:

The project will be lead by HRM Parks and Recreation Business Unit.

Broad oversight for the project will be provided through a working group made up of HRM staff providing decision making at key points. Provincial, Federal and Community museum stakeholders may also be consulted.

HRM will provide some communication resources to work with the proponent's team for the development and delivery of a communications strategy for the stakeholder engagement piece.

For this project, the Municipality has already undertaken or currently undertaking the following tasks:

- Curatorial review of the former DHM Collection, with updated artifact collection database. Phase 2 Collection Project work is on-going.
- Curatorial review and migration of artifact catalogue information for the former 'Civic' Collection, now located at the Municipal Archives.
- Development of Collection policies for former DHM and HRM Archival Artifact Collection.
- Co-ordination of the Central Heritage Regional Group meetings, with all HRM-based museums invited/attending.
- Development of the 'Museum Template'. This was a collaborative process developed with community museums in HRM to provide a standardized approach to gathering pertinent museum information. These twelve completed templates are available as a reference tool.
- Issued Phase 2 Cultural Heritage Priorities Plan RFP for completion in 2019.

Background Plans and Documents

Key Regional Museum Planning Documents and Council Reports (not limited to the following):

- HRM Culture and Heritage Priorities Plan (currently underway)
<https://www.halifax.ca/about-halifax/regional-community-planning>
- Item No. 12.1.2 – Creation of a Funding Program for Heritage Organizations
- Item No. 14.1.5 - Dartmouth Heritage Museum Society Request for Management Agreement and Funding
- Item No. 14.1.3 - Proposed Interim Community Museums Grant Program: Administrative Order 2018-010-ADM
- Item No. 14.5.2 - Sale of 90 Alderney Drive / Regional Museum Update
- Item No. 14.4.1 - Community Grants Program 2018 - Recommended Awards
Council Reports available at: <https://www.halifax.ca/city-hall/agendas-meetings-reports>
- Community Museum Templates – to be provided upon award
- Nova Scotia Museum Interpretive Master Plan - <https://museum.novascotia.ca/about-nsm/interpretive-master-plan>

Nova Scotia's Culture Action Plan - <https://novascotia.ca/culture/>

G. PROJECT OBJECTIVES

The key project objectives are to:

- Provide critical analysis on the background and current state of museums and collections in HRM including levels and types of municipal support, interpretive themes and programming, to inform next steps recommendations to Regional Council prior to conducting a feasibility study on options for a Regional Museum.

- Meet with stakeholders to gather accurate and robust interpretive and site descriptions.
- Alignment of SWOT analysis and interpretive overview with the Nova Scotia Museum Interpretive Master Plan.
- Present the final information in a clear and concise manner to be used as a foundational document for future phases of the Regional Museum Strategy.

H. DETAILED SCOPE OF SERVICES

The Municipality requires consulting services along the following themes:

- Cultural, interpretive and heritage planning
- Analytical and Needs Assessment
- Public Engagement

In addition, the proponent is expected to have expertise in:

- Historical research
- Graphic illustration and report document production
- Writing and communication

The proponent is expected to undertake, but not limited to, the following tasks:

Project Initiation

- Meet with HRM staff working group and with subsequent meetings with staff and key stakeholders.
- Define and confirm roles, goals and objectives for the Regional Museum Strategy.
- Finalize and provide electronically a detailed work plan and schedule that encompasses meetings and presentation schedules.
- It is assumed that regular meetings with HRM PM will be on-going throughout the project in a manner and timeliness approved by HRM during the initiation period.

Investigations and Analysis

- Review, present and document the background information that is to inform the current state and potential next steps in the Regional Museum Strategy.
- Conduct an examination of all identified HRM-based community museums, with interpretive overview and SWOT analysis to identify opportunities and gaps.
- Statistical analysis of the 3 benchmark city's municipal museum spending vs. HRM, with operational models and visitor experience comparisons.
- Identify latest trends in museums in Canada.
- Identify and describe new and planned cultural/heritage facilities in HRM.
- Investigate opportunities for temporary exhibits and programming with required resources and risks.
- Analysis and description of recent museum builds in Atlantic Canada.

Key Stakeholder Meetings

- Consult with identified HRM-based museums for information gathering.

- Access to 2017/18 Community Museum data will facilitate the information gathering process. Much of the background research has been completed and may require updating or minor enhancements.

Final Deliverables and Report

- Present a minimum of two drafts to HRM for review and revision prior to final report. Write a final report that summarizes the key findings of the consultative process that informs recommendations and next steps towards an eventual Master and Interpretive Plan.

I: PROJECT MANAGEMENT

The proponent shall designate in their proposal, a Project Manager. All coordination for services with HRM and the successful proponent shall be the responsibility of the Project Manager. The Project Manager shall ensure that any substitutions in the proponent team personnel are approved by the HRM manager.

The proponent's Project Manager shall:

- Report to HRM through a review process and meetings at various stages of the project.
- Provide copies to HRM of all correspondence related to the project including agreements reached on HRM's behalf.

HRM will assign a Project Manager from Parks & Recreation to coordinate information exchanges and schedule meetings and activities with the proponent. The proponent will likewise be expected to assign a Project Manager to fulfill this function.

The proponent will maintain frequent, open lines of communication with HRM's Project Manager and will be expected to report to the HRM Project Manager through a review process to be proposed by the proponent, including meetings at various stages of the work program and regular, written progress reports. The proponent's team will have expertise in consultative process and engagement; interpretive planning and writing; interpretive design and open-space planning.

The proponent will be required to meet in-person with the HRM project team at milestone points to present key findings and content for review. Therefore, the proposal should include an appropriate time-line and schedule to meet these expectations.

The project must be completed on time and on budget using a sound project management methodology and monitoring strategy. Where a schedule has not been met, a brief written explanation as to why shall be included. The progress report will be submitted digitally and via in-person presentation at milestones.

A risk management strategy as part of the proponent's proposal is also highly recommended as a means of anticipating challenges and solutions affecting the project outcomes.

J: REPORTING

The proponent will be required to submit regular reports and materials sufficient in their number and content to maintain a high degree of communication, coordination, and undertaking among staff and key stakeholders as to the core data, analysis and findings that will shape the Interpretive Framework, including:

1. A minimum of six (6) full hard copy final draft and final report(s) including colour copies of all illustrations and mapping in addition to digital files.
2. A report of key findings and recommendations at strategic points in the process including:
3. Copies of all HRM correspondence related to the project including agreements reached on behalf of HRM, the names and input from stakeholder and methods used to engage people.

Electronic copies of all information shall be provided on a USB drive. Microsoft Word 16, Excel and PDF are acceptable formats.

The proponent shall provide a label for the flash drives with the following information:

Headline: Project Drive

Title: ****RFP

Date:

Proponent Name:

All material produced and information collected by the proponent in the performance of these terms of reference shall become the property of HRM. All material shall be kept confidential by the proponent unless authorized in writing by HRM.

All cost estimates are required and are to include HST.

2. **MANDATORY TECHNICAL REQUIREMENTS**

The proposal must meet all the following mandatory criteria and clearly demonstrate that these are met in a substantially unaltered form. If the proposal fails to meet any one of these criteria, it will receive no further consideration during the evaluation process and be deemed non-compliant. [Click or tap here to enter text.](#)

3. **RATED CRITERIA**

The following is an overview of the categories and weighting for 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)
4.1 Communication Skills	5 points
4.2 Team Composition & Experience	25 points
4.3 Understanding HRM's Needs	25 points
4.4 Technical Solution	20 points
4.5 Quality Assurance and Communication	5 points
Sub-Total	80 points
Cost	20 points
Total Points	100 points

A minimum of 75% of the total available technical points is required at the Subtotal of the Rated Criteria for the proposal to move onto Stage III – Pricing.

3.1 **Communication Skills**

The proposal should be clear and readable. Information should be easy to find and should be in the order presented hereunder.

3.2 **Team Composition & Experience**

Sector Specific Experience: The proposal should clearly state the proponent firm's overall experience in the field of expertise required by the scope of work. The Proposal shall provide data and information on relevant projects and facilities which clearly illustrate their experience and ability to manage a project of this nature. Proponents shall provide a list of at least three (3) applicable reference projects completed over the past eight (8) years including client contacts that have contracted for the work and services offered by the proponent which are considered identical or similar to the requirements of this Request for Proposals. The list should include the following information:

1. Client/Company Name and Address
2. Contracting Officer and Telephone Number

3. Technical Representative and Telephone Number, and
4. A brief, written description of the project, operations, specific services provided, and scope of work including the year(s).
5. Proponent estimated contract value and final proponent contract value.
6. Description of the project's facility location, technology employed, size, capacity and materials handled, etc.
7. Proponent's degree of involvement in the project: itemize those areas within the proponent's control such as procurement, financing, design, technology, siting, construction, financial management, regulatory approvals, operations, ownership, staffing, marketing, etc.

Client contacts which include HRM staff are not desired and will not be considered.

Proponents must be able to demonstrate that the firm has an in depth knowledge of the scope of this assignment. The purpose of this information is to demonstrate the Proponent's experience and ability to complete similar projects, develop creative solutions, resolve complex issues and communicate effectively with various parties and audiences.

Experience of Project Lead with projects of similar scope and size: The Proposal shall include a summary of the relevant experience as it relates to their role in this assignment. A brief description (years in business, services provided, number of employees, etc.). Additionally, the Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable.

Key Team Members appropriate skills and education: The Proposal shall include, as appendices a CV detailing their experience, skills and education in relation to this assignment including the baseline work and the expected project areas with information on which personnel the proponent would be using for which anticipated types of tasks and work activities.

Demonstrated history of proposed Team: The Proposal shall include a brief description of each of the member firms, their role in this undertaking and the office from which their work will be conducted. A summary table format is acceptable. Additionally, the Proposal shall demonstrate the history of the member firms and individuals successfully delivering assignments of similar size and scope as a team.

Balance of level of effort: The proponent shall provide a proposed schedule to complete the tasks in the proposed work plan as well as a person-hours matrix (WBS) **without fees** outlining the hours each team member has allocated to each of the tasks in the proposed work plan. No hourly rates, dollar figures or costs shall be shown on this person/hours matrix breakdown; inclusion of any pricing information may result in disqualification of your Proposal.

3.3 Understanding of HRM's Needs

Understanding of the Requirements of the Scope of Work: Proponents shall provide a demonstrated understanding of the subject matter, including, but not limited to, the scope of work as well as the approach that will be taken to accomplish the Services related to this RFP

document, as well as an indication of possible challenges and solutions not directly referenced in the Request of Proposals.

Acceptable Proposed Schedule and Work-plan: Proponents shall provide a work plan with which clearly outlines milestones and timelines to demonstrate how the work will progress to the desired completion date. Proponents must present a realistic timeline of the proposed Project schedule. The schedule shall reflect the tasks in the work plan and will be updated on a monthly basis to reflect project progress and shall be submitted to the Municipality's Project Lead with the contractor's status report.

Value added propositions and recommendations: Proponents shall demonstrate an innovative approach to the completion of the assignment, utilizing all potential resources available to them.

Attention to Relevant Challenges: Proponents shall describe and attempt to address any challenges to the assignment which they have identified but may not be spoken to in the Request.

3.4 Technical Solution

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

Technical Solution: The proposal must address all of the business/technical aspects of the engagement as identified in the RFP.

Methodology: The proposal must combine proven project methodology and include innovative approaches and ideas in the delivery of the project. Proponents should keep this in mind when submitting similar successful projects for review.

Flexible and Scalable Solution: The proposal shall offer all of the services required to successfully deliver the project but should present a schedule that allows for adjustment, addition and/or deletion of specific activities as necessary to reflect budget availability, Regional Council direction or the evolution of the engagement.

Cost and Time Effectiveness: The proposal shall indicate how the successful proponent will effectively use the Municipality's internal resources.

3.5 Quality Assurance and Communication

Management Structure: The Proposal shall include an organizational chart indicating a clear reporting structure and escalation methodology.

Proposed Communication Methods: The proposal shall also indicate the number and frequency and method (i.e. /in person, web-conference, tele-conference, etc.) of the anticipated meetings. Meeting dates should also be included in schedule per requirements of section.

Quality Assurance Standards: A description of Proponents Quality Assurance methods and practices should be included.

APPENDIX B – FORM OF AGREEMENT

The standard services contract is available online at:

<https://www.halifax.ca/sites/default/files/documents/business/doing-business-halifax/2018-01-08%20HRM%20Standard%20Consulting%20Contract%20-%20May%2010%2C%202018.pdf>

APPENDIX C – COST PROPOSAL SUBMISSION REQUIREMENTS

1. Instructions on How to Complete Cost Proposal:

- (a) The Cost Proposal shall state the proponent's legal name and be duly signed by an authorized representative of the proponent.
- (b) The Cost Proposal shall state the proponent's firm-fixed total price for each of the tasks described in the Deliverables (Appendix A, Section 1). Proponents should include within the Cost Proposal on a separate page or pages, a detailed listing of the tasks and activities with a breakdown into work packages, details of all individual costs of the proposed services, and total costs (firm-fixed) – for the baseline tasks. A sample of an acceptable Cost Proposal format is provided in Section 2 below.
- (c) The total cost for the baseline tasks shall represent the maximum payment under the Agreement. Cost Proposals should include fixed prices, estimated hours of work by key staff and individual hourly cost for staff. Include and identify expenses and HST separately.
- (d) Cost Proposals shall include the proponent's hourly rates for key positions/tasks in the event that HRM requests project work in addition to the tasks herein. Hourly fees shall be held firm for the duration of the project. Note that there is no guarantee that HRM will request any additional project work, but unbalanced hourly fees may result in a re-evaluation of your proposal.
- (e) Cost Proposals will be evaluated based on sum of the proponent's total fixed cost for completing the project.
- (f) Prices shall be provided in Canadian funds, inclusive of all applicable duties and taxes excluding HST.

2. Sample of acceptable Cost Proposal Format:

The following is an example only and is not intended to prescribe the duties or roles of any of the consulting team in relation to the scope of work and deliverables.

Task #1

Position/Task	Expected Hours	Hourly Rate	Cost
Project Management			
Engineer (various levels)			
Certified Engineering Technologist			
Administration			
Other			
Total			

Task #2

Position/Task	Expected Hours	Hourly Rate	Cost
Project Management			
Engineer (various levels)			
Certified Engineering Technologist			
Administration			
Other			
Total			

Task #3

Position/Task	Expected Hours	Hourly Rate	Cost
Project Management			
Engineer (various levels)			
Construction Inspector			
Administration			
Other			
Total			

ETC.

SubTotal	
Total Project Cost (Fixed Firm)	
Estimated Reimbursable Expenses	
Total	

Hourly Costs for Additional Work

Position/Task	Hourly Rate
Project Management	
Engineer (various levels)	
Certified Engineering Technologist	
Hydrologist	
Geotechnical Engineer	
Surveyors	
Construction Inspectors	

APPENDIX D – PROPOSAL SUBMISSION FORM

1. Proponent Information

Please fill out the following form, naming one person to be the proponent's contact for the RFP process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	
Any Other Relevant Name under which Proponent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website (if any):	
Proponent Contact Name and Title:	
Proponent Contact Phone:	
Proponent Contact Fax:	
Proponent Contact Email:	
Nova Scotia Registry of Joint Stock Number (Leave blank if NOT applicable):	
HST / GST Registration Number (Leave blank if NOT applicable):	

2. Offer

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required. 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 prices set out in its completed Cost Proposal.

3. Rates

The proponent has submitted its rates in accordance with the instructions in the RFP and in the Cost Proposal Submission Requirements (Appendix C). The proponent confirms that it has factored all of the provisions of the Agreement (Appendix B) including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The proponent is deemed to have read and considered all addenda issued by HRM. The onus is on proponents to make any necessary amendments to their proposals based on the addenda.

The proponent is requested to acknowledge that it has read all addenda by listing the addenda numbers, or if no addenda were issued by writing the word “None”, on the following line:

If this line is not completed, the proponent will be deemed to have read and considered all posted addenda.

5. No Prohibited Conduct

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

6. 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 HRM in the preparation of its proposal that is not available to other proponents, (ii) 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 (iii) 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 in the Agreement that is the subject of this procurement, 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.

Proponents should disclose the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who participated in the preparation of the proposal; **AND** who were employees of HRM within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, the proponent will be deemed to declare that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

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

- The proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the proponent declares an actual or potential Conflict of Interest by marking the box above, the proponent must set out below details of the actual or potential Conflict of Interest:

7. Proposal Irrevocable

The proponent agrees that its proposal shall be irrevocable for a period of **ninety (90)** days following the Submission Deadline.

8. 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 HRM to the advisers retained by HRM to advise or assist with the RFP process, including with respect to the evaluation of this proposal.

9. Execution of Agreement

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

Signature of Witness

Signature of Proponent Representative

Name of Witness

Name of Proponent Representative

Title of Proponent Representative

Date

I have the authority to bind the proponent