



REQUEST FOR PROPOSAL FOR

CONSULTING SERVICES FOR A

MUNICIPAL HERITAGE DESIGNATION PROGRAM -- 74015

OKOTOKS, ALBERTA

Town of Okotoks

Issuance Date: September 12, 2017

Responses Due: October 3, 2017

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SEPTEMBER 12, 2017

SECTION 1

SUBMISSIONS

NOTE #1: ALL MAJOR DETAILS INVOLVING THIS PROPOSAL CALL ARE COVERED IN SECTION 2 ATTACHED.

In order to be considered in the selection process, interested parties shall submit three (3) hard copies of their Municipal Heritage Designation Program Proposal and one (1) electronic copy (USB) no later than **2:00pm October 3, 2017**. Submissions received after this time will be returned to the sender.

Proponents shall send proposals marked “**CONSULTING SERVICES FOR MUNICIPAL HERITAGE DESIGNATION PROGRAM**” to Allan Boss, Culture and Heritage Manager at:

Information Counter, Main Floor,
Town of Okotoks Municipal Centre,
5 Elizabeth Street
Okotoks, Alberta,
T1S 1K1

Or by mail/courier addressed to:

Allan Boss, Culture & Heritage Manager
PO Box 20, Station Main
Okotoks, Alberta
T1S 1K1

Fax or e-mail submissions will not be accepted

Late submissions will not be accepted and will be returned unopened

Opened RFP responses are the property of the Town of Okotoks and are not exposed to public viewing.

The Town reserves the right to cancel this Request for Proposal for any reason without any liability to any proponent or to waive irregularities at their own discretion. Proposals may be withdrawn by written notice only provided such notice is received by the Culture and Heritage Manager prior to the date/time set as the closing time for receiving proposals.

All proposals will remain confidential, subject to the Freedom of Information and Privacy Act.

Any interpretation of, additions to, deletions from, or any other corrections to the Proposal document, will be issued as written addenda by the Town of Okotoks. It is the sole responsibility of the potential Proponent to check with the Town's Website, to ensure that all available information has been received prior to submitting a bid.

The Town, its agents and employees, shall not be responsible for any information given by way of verbal communication. Any questions that are received by Municipal Staff that affect the proposal process will be issued as addenda by the Town of Okotoks.

The Town of Okotoks is not responsible for proposals that arrive late, are not properly marked, or which are delivered to any location within other than the office of the Culture and Heritage Manager. Proposals not received and time-stamped by the aforementioned deadline in the aforementioned office will be rejected and returned unopened.

The eventual award of the proposal call will be reported to the Council of the Town of Okotoks.

Should the Town of Okotoks receive only one (1) qualified and duly executed response it reserves the right to cancel this proposal call and return the response to the proponent.

The Town of Okotoks reserves the right not to accept a Proposal response from any person, corporation or entity who, or which, has a claim or instituted a legal proceeding against the Town of Okotoks or against whom the Town has a claim or instituted a legal proceeding with respect to any previous contracts, bid submissions or business transactions who is listed as either the proposed vendor, general contractor, or sub-contractor within the submitted proposal.

INSURANCE

The successful lead proponent will be required to provide evidence of Errors and Omissions insurance coverage in an amount of not less than one million dollars (\$1,000,000.00) in regards to this project. A certificate will be required within ten (10) calendar days of award.

SUMMARY AND BACKGROUND

2.1 Introduction

The Town of Okotoks (the Town) requests Proposals from qualified, experienced, professional, heritage consulting firms to develop a comprehensive Municipal Heritage Designation Program (MHDP) for Okotoks. The outcome will include recommendations regarding bylaws, policy, and provide the steps necessary to implement and operate a sustainable heritage designation program specific to Okotoks.

The Town of Okotoks recognizes that an MHDP can generate social, economic and environmental benefits. These benefits go farther than simply conserving a legacy for future generations; conservation and investment in heritage serves to enhance community and thereby improves overall attractiveness and livability. Preservation and investment in historic structures and community heritage works together with other elements – quality built and natural public spaces, a variety of housing options, recreation, arts, culture, and creativity, accessible communications technology – to create place. As such, the MHDP will contribute to placemaking and serve as an investment in community which boosts property values, creates local jobs, attracts new businesses, and promotes tourism.

Proposals for the MHDP should:

- i. Devise policy, bylaws, and guidelines that define and set the parameters of the program.
- ii. Inform, guide, and regulate heritage planning in Okotoks, ensuring alignment with other plans including: the Municipal Development Plan, Culture and Heritage Master Plan, and the Recreation and Parks Master Plan.
- iii. Confirm future needs and aspirations of the community are met through the preservation of Okotoks' heritage, both intangible and tangible.
- iv. Build on previous research to provide an enhanced representation of Okotoks heritage.
- v. Address municipal heritage preservation strategies and incentives.

The MHDP must set guiding principles that address its role in community sustainability, content and audience diversity, cultural heritage, issues of authenticity, and cultural

identity. The MHDP must reveal the needs of citizens and propel Okotoks forward, reflecting proud origins and a shared, passionate future.

2.2 Background

“In the year 2030, Okotoks is a leader in sustainability, driven by an involved, connected and creative community. Through visionary leadership, citizens are engaged in maintaining a safe, caring and vital community that honours our culture, heritage and environment.” – Social Wellness Framework, p. 1

Nestled along the Sheep River Valley in the heart of the Alberta Foothills, the Town of Okotoks is a young, vibrant and friendly community of 28,833 residents ([2016 Census Profile, Statistics Canada](#)). The population of Okotoks in 2006 was 17,150; by 2011 it grew 43% to 24,511; from 2011 to 2016 there has been 17% growth and 68% since 2006. Thirty-one percent (31%) of the population is 19 or younger; 33% are between the ages of 20 and 44; 25% are between 45 and 64, and 10% are over 65.

The development of a MHDP for Okotoks anticipates the growth of the municipality. In 2012 Okotoks moved from a limited growth model with a 30,000 person population cap, to a continued growth model that predicts an 80,000 person population within 60 years. This transition period presents an opportunity to plan for the future of our community. As part of planning it is critical to establish a MHDP that will capitalize on research coming out of a new Culture and Heritage Master Plan and that will, then, inform and align with the Downtown Urban Master Plan, the Municipal Development Plan, and the Environmental Master Plan (among other plans) in order to preserve our distinctive community and safely preserve our valuable heritage properties.

“Action Item 2: Historic Building Preservation” in the 2009 Culture, Heritage + Arts Master Plan (CHAMP) recommended that the Town of Okotoks “guide the preservation, acquisition, adaptive re-use and interpretation of key structures” (p.52) and ensure the preservation of historic buildings. CHAMP also called for the establishment of a downtown core historic precinct, and the development of policy that retains and supports Okotoks’ unique cultural heritage (p. 52-53). Under the header of Animate Downtown, the more recent Okotoks Community Sustainability Plan also recommends that Okotoks should put in place a “Municipal heritage designation for historic buildings” (p. 15). The Recreation, Parks, and Leisure Master Plan identifies the importance of heritage in multiple places, suggesting that “Preserving and further developing the historical aspects of an urban parks system embed the importance of these spaces within the community and increase resident interest and utilization” (p.30).

Initiating a Municipal Heritage Designation Program will provide administration, based on Council’s policy direction, the tools to identify, protect, and celebrate Okotoks’ rich

and diverse heritage. It will provide comprehensive guidance for the management of heritage resources, including but not limited to heritage properties and parks.

In 2007 the Town conducted an inventory of potential heritage designation buildings. The project identified 42 properties and provided draft Statements of Significance for 15 (cross-sectoral) properties identified in the larger inventory. Currently, there are three provincially designated properties in Okotoks: Stockton Block, Mahon House, and W.D. Lineham House.

2.3 Questions/Responses

This project will be carried out under the direction of the Community Services Division. Clarification of terms and conditions of the proposal process or technical clarification shall be directed to:

Allan Boss, Culture and Heritage Manager
PO Box 20, Station Main
Okotoks, Alberta
T1S 1K1
Phone: 403-995-2776
Email: aboss@okotoks.ca

The Town of Okotoks assumes no responsibility or liability arising from information obtained in a manner other than as prescribed in this RFP.

2.4 Pricing/Budget

1. A budget not to exceed \$45,000.00 excluding GST has been set for this project.
2. The \$45K should be scheduled over a three year period to allow for sufficient research: \$9K in 2017, \$18K in 2018, and \$18K in 2019. (See 3.2, Key Objectives)
3. All proposals must be in Canadian dollars. All applicable taxes must be shown separately.

2.5.1 Fee Schedule

1. Total upset fee to be all inclusive for the completion of the project as identified, to include but not limited to all sub-consultants and all disbursements.
2. GST to be shown extra.

3. Proponents must indicate detailed hourly rates for additional services for the lead proponent and each of their team members.

SECTION 3

PROJECT PRINCIPLES & OBJECTIVES

3.1 Project Guiding Principles

3.1.1 Pertains to Okotoks.

1. Guides the development of policy, bylaws, and guidelines.
2. Strengthens the Town's commitment to heritage planning.
3. Clarifies the respective roles and responsibilities of the Town and those of other sectors.
4. Highlights community assets, recognizes and values community expertise and processes and generate local solutions to local problems.

3.2 Key Objectives

The goal of the project will build on research conducted in 2007 when the inventory of potential heritage designation buildings was assembled.

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|-----------------|---|
| Stage 1 (2017): | In the first stage emphasis will be establishing bylaws, policy, and procedures, including recommendations for future implementation of MDHP. |
| Stage 2 (2018): | The second stage should focus on testing the new procedure by designating (at least) one heritage property from those already identified. |
| Stage 3 (2019): | The third stage shall assess and expand upon the existing inventory and complete the Statements of Significance. |

The outcomes should be created and owned by the community, supported by Council through policy development, and set into action by administration.

3.2.1 Engage, Connect and Inspire the Community

In order to succeed, the MHDP must be co-creative, collaborative and help participants and stakeholders come together to find new ways to address challenges and address complications at the community level. This local government plan will be informed by community consultation in order to articulate vision and validate the planning process and outcome.

3.3 Supporting Documentation

There are a number of studies, plans and supporting documentation that have been completed which will provide background information in the development of the MHDP. These documents listed below are available for download at the following link:
<https://owncloud.okotoks.ca/index.php/s/kQdnQK4L4Lln2q>

1. Town of Okotoks Inventory of Potential Heritage Designation Buildings (2007)
2. Community Sustainability Plan (2014)
3. Culture, Heritage + Arts Master Plan (2009)
4. Recreation, Parks, and Leisure Master Plan (2017)
5. MDP Consolidated (2016)
6. Community Sustainability Plan (2014)\

It will be the task of the successful proponent to review and assess the information results from these documents, identify gaps in information, and conduct additional research where necessary. In the development of a comprehensive MHDP ensure recommendations in the plan are aligned with current municipal, provincial, and federal legislation, regulations, and related specifications.

3.4 Roles and Responsibilities

3.4.1 Project Teams

The Project Manager will be the Culture and Heritage Manager, and shall be the primary point of contact with the proponent. The Project Manager will establish and coordinate overall project delivery, and ensure that the critical path and significant milestones are met.

The Selection Committee will be comprised of Town staff, and their role is to:

- i. review and finalize the terms of reference
- ii. evaluate all compliant proposals

- iii. assist in the preparation of interview questions for the prospective proponents, if required
- iv. interview and select successful Proponent, if required

Town administration will have the following roles in helping to develop the MHDP:

- i. Ongoing review of the development of progress reports to ensure the terms of reference are being adhered to;
- ii. Provide guidance, feedback, and recommendations for the MDHP process including goals, objectives, and public consultation process;
- iii. Participate in review, public consultation, and other activities as it relates to the research and MDHP development;
- iv. Attend pertinent meetings to deal with the study development and the development of relevant recommendations;
- v. Provide information and data to proponent as it relates to their area of expertise;
- vi. Provide existing reports, background information, and inventory information to the proponent;
- vii. Provide community group contacts to proponent;
- viii. Provide a supportive role in organizing meetings and acting as facilitators of consultation process;

The Town has several Council advisory committees which provide recommendations on aspects of the community. For the purpose of this project the Culture, Parks and Recreation Committee (CPR) will act as the advisory committee.

3.4.2 Role of the Proponent

The proponent will be responsible for designing, conducting, researching, analyzing, writing and reporting the findings of the MHDP. The proponent's role is to develop, lead, facilitate and document the process, analyze the results and address the key objectives. The proponent will be required to utilize the Town of Okotoks Public Participation Toolkit based on IAP2 best practices.

The proponent team will have knowledge and experience in:

- i. Culture & Heritage planning
- ii. Culture and Heritage trends and issues
- iii. Community Engagement
- iv. Marketing & Communications
- v. Technology trends
- vi. Land use planning
- vii. Strategic planning
- viii. Policy & Bylaw development
- ix. Demographic information and future trend analysis

The proponent will specifically be responsible for the following:

- i. Provide a detailed critical path, outlining each task, indicating target dates for progress reports, meetings with Town administration, analysis, submission, draft and final reports (submitted and confirmed prior to commencement of project)
- ii. Design, lead and facilitate a planning and decision-making process.
- iii. Chair, facilitate, and document planned meetings.
- iv. Attend staff, committee and Council meetings as required throughout the process.
- v. Develop, produce, circulate, and analyze all materials: (maps, charts, presentation boards, pamphlets, handouts, etc.) needed for public consultations, presentations, etc. to groups, the public, staff, Advisory Committee, and Town Council.
- vi. Consult with the Project Manager to discuss appropriate communication strategies and tactics.
- vii. Prepare status reports and presentations to Advisory Committee and Council at key stages of the process.
- viii. Prepare and present both a draft and final report to Strategic Leadership Team, Advisory Committee, and Council.

3.5 Study Area

The study area includes the Town (including future annexation areas). Town maps and use of Town planning population projections to assess future growth, social demographics from a Town-wide perspective will be available.

3.6 Public Consultation Process

We require a full and thorough public consultation process that is targeted and focused, in order to ensure a wide range of community input. The expectation is that the successful proponent will work with the Town's Public Participation Toolkit.

It should contain a clear expectation of the role of the Town in the consultation process with respect to logistics and organizational implications, expectations and other considerations.

When responding to this RFP document, the Proponent will describe the following:

- the design of a community input process that will engage input from the public, key stakeholders, Advisory Committee, and Town Council at different stages of the planned process
- the responsibilities of the proponent and the Town of Okotoks
- the expected timing and number of public consultations

The proponent will provide facilitation services and develop materials and presentations for various forums with the community, at key times during the process. This is to assist in the stimulation of creative thinking and to encourage public input.

3.7 Timing

RFP Issue Date	September 12, 2017
RFP Closing Date	October 3, 2017
Interviews for Short listed Proponents (if required)	October 9, 2017
Award of Contract	October 13, 2017
Consultation with Staff & Advisory Committee	October 16-31, 2017
Background Research	November-December, 2017
First Draft of Policy, Bylaws and Guidelines	January, 2018
First Draft Report to Community	January, 2018
Report to Staff & Advisory Committee	January, 2018
Revisions and Final Report to Council	February-March, 2018

The project will begin immediately upon the Contract Award. The above noted draft critical path will be used as a guide for timely completion of the project. Although every attempt will be made to meet all dates indicated above, the Town reserves the right to modify any or all dates at its sole discretion.

3.8 Report Requirements and Content

The final report shall include a clear and concise description of the work undertaken, including data sources as well as a comprehensive discussion and analysis of the existing and future conditions.

The Proponent shall provide the following with respect to all documentation:

- I. Executive summary of the main findings, including key recommendations for future services in the Town of Okotoks, numbered and priority ranked.
- II. Assessment of demonstrated need as it relates to objectives set out in RFP.
- III. Assessment of delivery of services.
- IV. Summary table of outcomes.
- V. Appendix with documented summary of all processes, community input and outcomes.
- VI. Copies of any communication items such as newsletters, publications, media releases, public meeting agendas, website updates etc.
- VII. Copies of any questionnaires or input tools used in the reporting of results.
- VIII. Fifteen (15) copies of status reports.
- IX. Fifteen (15) bound final report copies.
- X. One (1) camera-ready electronic copy of the final report.
- XI. One (1) electronic format, on compact disk, of the final report compatible with Town's computer hardware and software systems.
- XII. Reproducible copies of all plans, maps and associated documentation.
- XIII. A PDF version of all status reports, final plan and executive summary for the Town's website.

The Town retains the rights to all original text, maps, display materials, reports or other communication elements associated with the study. No materials, data or information may be released to the public without consent from the Town.

The Town retains the rights to the completed reports and all drafts, materials, information collected during the project.

3.9 Proposal Submission Format and Content Requirements

Proposals will be evaluated and scored in accordance with criteria (p. 15), and will consider mandatory requirements, proposal organization, clarity, content, presentation and format.

Proposals will clearly indicate how the work will be carried out.

Proposals will include name, address, telephone number of the prime proponent and all proposed sub proponents.

3.10 Mandatory Proposal Submission Response Requirements

Proponents must demonstrate the ability to meet the following mandatory requirements. Failure to comply with these requirements will deem the Proposal to be non-responsive.

- I. Provide a critical path and work plan meeting all specific target dates.
- II. Provide a detailed cost analysis breakdown.
- III. Provide three examples of relevant projects completed in the last five years.
- IV. Provide three references (with contact information) for similar projects.
- V. Provide evidence of ability to provide minimum insurance coverage.
- VI. Provide conflict of interest statement.
- VII. Provide the Signature Form signed with an original handwritten signature in ink; stamped or reproduced signatures of any kind are not acceptable.
- VIII. Provide three (3) hard copies of the Proposal, each with copies of any supporting documentation shall be submitted. At least one must be with original handwritten signatures and marked "Original" additional copies may be marked "Duplicate."
- IX. Provide one (1) electronic copy of the Proposal on USB stick.

Proposal response shall also contain, as a minimum, the following information:

- I. A corporate profile of their firm, outlining background, philosophy, experience.
- II. Designation of key staff who would be assigned to work on this project, together with their relevant experience and qualifications to undertake the project, as well as descriptions of various types of relevant projects that they have undertaken in the past five years.
- III. Description of the role each member of the proponent team will perform on the project; a detailed approach and strategy for achieving the objectives and project deliverables as outlined in the RFP.

- IV. Detailed description of research to be conducted.
- V. Proposed work plan that outlines the activities to be undertaken, provides the anticipated start and completion dates for the plan, the duration of each task required to complete, timing of meetings, support require and key milestones.
- VI. Provision of a pricing methodology, complete with time allotment for each task, and the schedule of fees and disbursements for staff assigned to the project – this will form the basis for payments to the successful proponent, as well as for adjustments to the value of the contract on the vent that the scope of work varies from initial proposal.
- VII. Hourly rate for each team member.
- VIII. Provide a fee for the assignment, and identify resources or areas where the intention is to utilize sub-proponents.

3.11 Proposal Evaluation

This RFP document is not intended to limit Proponents' submissions, but rather to provide a framework for the Town of Okotoks to evaluate each, and determine which submission closely addresses our needs. Proponents are encouraged to provide any additional information or innovative approaches not specifically outlined in this RFP. Proponents will provide any reasonable additional information upon request by the Town.

Based on the submission, a short list of preferred candidates MAY be selected for an interview (if required) to explain their methodology, within the context of the Terms of Reference. The interview may consist of a 20 minute presentation by the Proponent and a 20 minute question and answer session.

Presenters will be required to supply their own presentation equipment and materials.

Proposals will be evaluated on the basis of all information provided by the Proponents. Each Proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlined in the RFP. Failure to comply with the requirements outlined in the RFP may deem the Proposal to be non-responsive. Proposals submitted in response to this solicitation shall be evaluated using the criteria listed in the table following:

Proposal Evaluation Criteria Form

EVALUATION CRITERIA	AVAILABLE POINTS TO BE AWARDED
Clear understanding of the scope of work, identification of key issues and initiatives;	40
Experience of consulting team; experience in developing similar plans for municipalities with population 26,000 and over in size, scope and complexity;	30
Clearly defined roles and responsibilities and level of involvement of key personnel for the duration of the project;	20
Total cost and value based on the project requirements, with itemized fee schedule for final product and direct staff/time/cost/task listing.	10
Total Points	100
Interview (if required)	50
Grand Total Points	150

SIGNATURE FORM

The final item of your Proposal must include the following signature form:

The undersigned company represents and warrants that it is authorized to carry on business of this nature and that it is not prohibited by any law applicable in Alberta from performing this Contract. The undersigned also acknowledges receipt and understanding of, and has taken into consideration all information presented in, this RFP and agrees to be bound by its terms and conditions. The undersigned further confirms and agrees that the person whose name is set out below is fully authorized to represent the company and to bind it to this Proposal and the Contract awarded pursuant to it and in all matters relating to or arising out of the subject matter of this Proposal.

Company

Date

Mailing Address

Name and Title (Please Print)

City, Province, and Postal Code

Email Address

Phone and Fax Number

Authorized Signing Officer

SCHEDULE OF COSTS / INVOICING

The Total Cost will be the absolute maximum invoiced amount allowed under this contract unless exceptional conditions are encountered or instructions to the contrary are issued by the Town. Neither estimating errors nor internal production assumptions will be considered as exceptional conditions. Any changes that may affect the Total Cost must be identified and approved in writing by the Town.

Incidentals such as vehicle rates, computer rates, CAD rates, fax machine rates etc. must be listed. Omission in identifying an incidental item will be deemed as providing the service at nil charge.

- Provide a fee for service schedule, hourly costs for services, and hours committed to the project.
- Provide schedules and estimates for the other related disciplines the proponent feels are needed for this project.
- Provide an estimate for disbursements and incidentals. Omission in identifying an incidental item will be deemed as providing the service at a nil charge. Disbursements must be listed and a separate cost shown.

The proponent shall present a detailed fee schedule for each phase of the project and shall present the following information:

Milestone Event	Date	Percent (%) of Total Cost
3.2.1 Heritage Mapping		

	Percent of total project	
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3.2.2 Engage Community		
	Percent of total project	
3.2.3 Reporting and Recommendations		
	Percent of total project	
	Phase 1 + 2 + 3	100% (\$45,000.00)

Invoicing will be accepted after completion of each phase. Invoices must reflect purchase order numbers and be supplemented with a brief expenditure report showing per phase costs this period, costs to date, projected final costs, and original estimated costs. The expenditure report must include the costs represented by the current invoice and must be attached to the invoice for easy reference.

PROPONENT QUALIFICATIONS

Please provide your company's qualifications, a list of key staff who would be assigned to work on this project, together with their relevant experience and qualifications to undertake the project, as well as descriptions of various types of relevant projects that they have undertaken in the past five years. Include a description of the role each member of the proponent team will perform on the project a detailed approach and strategy for achieving the objectives and project deliverables as outlined in the RFP.