Request for Proposal (RFP)

For the Provision of Professional Consulting Services
For the Development of a (Five Year)
Community Economic Development Planning Process

Issue Date: December 18th, 2015
Submission Deadline: January 20th, 2016
INTRODUCTION

The Sault Ste. Marie Economic Development Corporation (SSMEDC) is requesting proposals from firms with experience and expertise in conducting community and economic development consultation and planning processes to undertake specific activities in support of the following:

1. The development of a five-year economic development plan for the City of Sault Ste. Marie and area 2016-2020;
2. The development of a five-year SSMEDC Corporate Strategy;
3. The development of a comprehensive community plan for Sault Ste. Marie that incorporates and integrates this economic development strategy within the broader community plan.

The economic development strategy is intended to help align and complement the City's Community Plan (CP), which will have a longer time horizon to realize key outcomes. This strategy is an integral part of the community plan and will provide the basis for the five year SSMEDC Corporate Plan.

The following provides the terms of reference for this assignment. The qualified, selected firm will be expected to immediately undertake this assignment. Further details are provided in the latter part of the RFP on the structure and requirements of the proposal to be submitted. This assignment is a collaborative approach that will draw on the expertise, capabilities and resources of the SSMEDC and other key community economic development stakeholders in the City.

The expected outcomes for this assignment are the following:

- **Stakeholder Preparation and Readiness**: a completed consultation process with appropriate documentation and reports that provide the basis for executing community planning process;
- **Environmental Scan**: an environmental scan that will reflect the collection and analysis relevant data necessary for the development and implementation of community economic development plans and strategies;
- **Terms of Reference/RFP**: A document including a terms of reference, critical path/timetable, and framework for the development and implementation of this planning process.

The focus of this assignment is to provide the basis for the development and creation of a Sault Ste. Marie economic development plan. The SSMEDC recognizes the effective
community economic development planning must align with all aspects of the community's well-being (economic, social, environmental and cultural). In this respect, this undertaking will align, support and be integrated with the broader community planning effort. Similarly, this assignment recognizes that the SSMEDC itself and other stakeholders may use this information as the basis for their own growth and development plans and strategies. In addition, the identification and measure of outcomes and results will be incorporated into the planning process. And finally, the firm will need to recognize and consider that the effectiveness of any plan and its execution is in part a function of the commitment and support it receives from stakeholders, community organizations and citizens themselves. The extent to which thought and direction is given to effectively engaging these groups will be an important consideration in the overall assignment.
TERMS OF REFERENCE

Background:
The City of Sault Ste. Marie is currently exploring ways to develop a comprehensive Community Plan (CP). The Mayor’s Office is currently assessing ways and having informal discussions to determine a course of action or process to develop and implement the community plan. It is a priority for the Mayor. The Sault Ste. Marie Economic Development Corporation (SSMEDC), Sault Ste Marie Innovation Centre (SSMIC) and other leaders with a commitment to the community have been supporting participants in these very preliminary discussions.

These discussions have now reached a point where the consensus is that it is time to begin more formally engaging City Council and undertaking initial consultations with some key community stakeholders and leaders. The Mayor expects to report to Council on his thoughts perspective on this undertaking in the near future.

The Sault Ste. Marie Economic Development Corporation previously received support from City Council through the City’s Economic Development Fund (EDF) to undertake the first phase of a SSM Sustainable Growth and Development Stewardship Strategy 2020-2025. This consists of:

- A consultation process with identified, leading key community stakeholders including public/private organizations, institutions and businesses in the community;
- A comprehensive environmental scan of the growth, development and sustainability issues and opportunities in the community in all relevant fields;
- A planning document including a terms of reference, critical path/timetable, and planning framework for the development and proposed implementation of this strategy.

General Context and Perspective:
Community development is defined as the planned evolution of all aspects of community well-being (economic, social, environmental and cultural). It is a process whereby community members come together to collectively generate solutions to common problems or take advantage of opportunities that will benefit the whole. The scope of community development can vary from small initiatives within a small group, to large initiatives that involve the whole community. Regardless of the scope of the activity, effective community development should be:

- long-term
- well planned
- inclusive and equitable
• holistic and integrated into the bigger picture
• initiated and supported by community members
• of benefit to the community
• grounded in experience that leads to best practices

Community Development is a process designed to create conditions of economic and social progress for the whole community with its active participation and fullest possible reliance upon the community's initiative." (United Nations 1948)

The community planning framework is predicated on some assumptions and considerations:
• Its citizens care for the community;
• There is a general belief that the city is a great place to live work and play; it has significant unrealized potential – it can be better;
• There are significant challenges ahead and as a community, its citizens need to get ahead of them or, make them head-on;
• Individuals and organizations in the community must share either a sense of responsibility or have accountability for contributing to the planning and development of the community.

Sault Ste. Marie and area recognizes the need to focus on a holistic approach to development that integrates among other considerations economic, social, environmental and cultural goals. Even though the need for this project is obvious, its success will depend on the strength of the "human resources" in Sault Ste. Marie and area. People get things done; not plans, not processes, and not technology.

This framework is predicated on a simple proposition: a coordinated collective effort is more effective than a disparate and disjointed response. The overarching goal is to "organize and marshal a coordinated and collective response". It’s time to begin engaging City Council, while recognizing not all the groundwork has been laid for a fully realized comprehensive response.

The City has a history of undertaking various forms of community planning and engagement. The last two decades the following types of initiatives were undertaken to focus on the city’s development:
• R.A.P.I.D.S. (Research, Action, Promote, Infrastructure, Delegate, Support) [1993]
• Building an Extraordinary Community (BEC) [1998]
• Destiny SSM [2003]
• Communities Quality Improvement (CQI) [2007]
• Greater Community Forum [November 2014]
The community’s experiences with these initiatives are valuable in advancing this undertaking. One aspect of a particular is the recognition that all parts of the community need to be engaged in the broader community development effort.

**Sault Ste. Marie Economic Development Corporation**

The Sault Ste. Marie Economic Development Corporation is an independent, not-for-profit Corporation that receives substantial support from the municipality, along with financial support from other private and public sources. The SSMEDC is the City’s mandated lead economic development lead organization as reflected in the SSMEDC - MOU for Accountability. \(^{(1)}\) In support of the undertakings noted, the SSMEDC is proceeding with four-stage process to support these undertakings:

- **Stage I:** Preparation & Community Readiness
- **Stage II:** Consultation and Information Collection
- **Stage III:** Analysis and Goal Setting
- **Stage IV:** Implementation and Action

The SSMEDC is working in collaboration with the **Community Development Corporation of Sault Ste. Marie and Area (CDC)**, a federally supported Community Futures Development Corp. whose mission is to work with individuals, businesses and community partners to facilitate the creation and maintenance of jobs and to build a healthy, sustainable community. One of the CDC’s goals is to support community economic development (CED) and community strategic planning.

**I. Stage I: Preparation & Community Readiness**

- **Purpose:**
  - To undertake the preliminary work and assessment necessary to effectively undertake a strategic economic development plan for the community;
  - To engage a select but diverse group of community leaders who: as a result of a combination of experience, expertise, role/accountability, perspective and interest in the community, would be prepared to engage in a facilitated process to:
    - To develop an economic vision for the community (in terms of growth and development) supported by a rational and justification for the community to consider;
    - To identify and assess priority economic sectors and critical economic development challenges/activities from that the community must take into consideration in its economic and community planning processes;
    - To identify goals, objective critical success factors/outcomes and results for these processes
• To assess the capacity ability and experience of the community and its citizens in undertaking these types of economic development planning processes
• To determine the strength of the community’s human resources, its interactions and networks;
• To develop terms of reference and implementation plan for Stages II – IV

II. Stage II: Consultation and Information Collection

• Purpose:
  o Information collection
    • Objective: develop a thorough sense of the community’s challenges and opportunities as either perceived or understood across the community.
  o Community engagement:
    • Objective: include the “key” organizations in the consultation process in order that they may be either accountable or responsible, as the case may be, and ensure that they have a vested interest in continuing their participation.

III. Analysis and Goal Setting

• Purpose:
  o Assessment of information collected & compiled through consultation;
    • Objective: determine what that information means both practically and procedurally.
  o Goal setting
    • Set of specific goals based upon an acute and educated assessment of the challenges and opportunities that we have identified (short and long term).

IV. Stage IV: Implementation and Action

• Purpose:
  o Constructing (developing) and implementing the plan to meet the specific goals

ASSIGNMENT

The SSMEDC requires a firm to support community efforts in the preparation of a five year economic development strategy for Sault Ste. Marie and area, which will be an integral part of a City community plan and the basis for the Corporation’s five year strategic plan. The SSMEDC proposes to undertake this assignment on a staged basis as
previously described. The activities that the consultant is expected to undertake as part of this assignment include the following deliverables:

1. Meetings, document review, to refine and agree upon on a work plan with timeframes in the engagement letter;

2. Preparation of a brief (slide deck and short report) to community leaders which serves as a situation analysis and environmental scan of the economic/employment conditions currently existing in the community;

3. Prepare appropriate correspondence for community leaders who are either responsible and or accountable for organizations that can support the development and implementation of the strategy and should be engaged and supportive of this process.

4. Complete concise evidence slide deck that outlines the “why” we need to do this and why a community leader may be responsible and or accountable for engaging and supporting this process.

5. Identify end goals with targets that move beyond incremental growth/status quo into areas requiring human and capital investment

6. With SSMEDC and City, build a leadership team by:
   a. Identifying people in the community who are visionaries, action-oriented, and could be recruited to serve on an initial project-leadership team.
   b. Using prepared statements/evidence, contact and request agreed upon leaders/community drivers to attend consultation sessions (max. 10 leaders)

7. Meetings/Consultations
   Organize and undertake a series of consultations sessions (meetings) that will include the following:
   a. Present evidence/need to leaders for change
   b. Request current strategic information/ideas/opportunities from their organization and their networks
   c. Identify common themes and misalignment
   d. Meet again and present common themes/alignment
   e. Gain Consensus on direction and undertake preliminary Goal Setting

8. Create Communication Plan with City

9. Provide Final Stage 1 Report including a Terms of Reference & Action Plan for Stages II-IV
Timeframes:

- The successful firm will be expected to immediately commence work and complete the assignment by the end of March 2016.
INFORMATION AND INSTRUCTIONS

Closing Date and Time

Proposals must be received by the Manager, Corporate Services or designate before 12:00 noon local time on January 20, 2016. SSMD in will not accept submission of any proposals after the closing date and time and any received will be returned to the Vendor unopened.

Proposal Submission

Responses to this RFP need to be concise with a maximum of 10 pages, a detailed budget and the supporting attachments, resumes of team members, examples of previous work, etc. are required to be received in electronic format (MS Word or PDF file) with no single email being over 4 MG. In addition to the electronic copy, four paper copies of the complete package must be submitted to:

Sault Ste. Marie Economic Development Corporation
C/o Debbie LaFleur
Manager, Corporate Services
99 Foster Drive, Level 1
Sault Ste. Marie, ON P6A 5X6
(705) 759-5280
dlafleur@ssmedc.ca

Proposal Contents

Proposals must include the following components, each in appropriate detail:

- A description of the Vendor’s firm along with any other firms which will be taking part in the work on behalf of the primary Vendor.

- A description of the Vendor’s experience in similar projects along with the expertise of any other firms that will be involved as part of the Vendor’s team. Respondents should include at least three (3) references that outline previous projects of a similar nature that have been completed by Vendor. This will include the client names and contact information including telephone numbers. The SSMD reserves the right to contact these references.

- Resumes of key staff proposed to work on the project. The resumes should identify achievements relevant to the project at hand.

- An indication of the Vendor’s understanding of the project scope and requirements, including how each of the specific requirements will be performed.

- A proposed timetable for completing the project. Proposed meeting dates, other key events and major project deliverables should be identified on the project timetable.

- A breakdown of all project costs, including an estimate of anticipated expenses.

- Vendors may include any additional information regarding their firm and/or services that may prove beneficial to the evaluation of the proposal. This information would be provided in the form of appendices.

Pricing and Additional Work

The Vendor will provide a Guaranteed Maximum Price for all project work, and shall abide by the price stated. No further payments beyond the contract amount will be made for any additional services required to provide a satisfactory deliverable. If additional requirements are requested by SSMD beyond the scope of work described in this RFP, the cost of these services would be negotiated between SSMD and the company that has been selected to perform the work. Any additional work will only be undertaken based on a request in writing from the SSMD.
Invoicing
SSMEDC will work with the Vendor to determine a payment schedule acceptable to both parties.

SSMEDC’s Internal Use of the Proposal
SSMEDC may reproduce the Vendor’s proposal and any supporting documentation for internal use.

Errors and Omissions
The information contained within this RFP is supplied solely as a guideline for responding Vendors. The information is not necessarily comprehensive or exhaustive and nothing in the RFP is intended to relieve Vendors from forming their own opinions and conclusions with respect to the matters addressed in the RFP. Should a Vendor feel that there are errors, omissions, or discrepancies in any of the proposal documents, or should the Vendor be in doubt as to the meaning of any part of such documents, the Vendor should notify Manager, Corporate Services or designate without delay.

Addenda
If required, addenda will be posted on SSMEDC website www.sault-canada.com
It is the Vendor’s responsibility to ensure all addenda has been read and noted.

Vendor Expense
Any expenses incurred by the Vendor in the preparation of the proposal submission are entirely the responsibility of the Vendor and will not be charged to SSMEDC.

Acceptance or Rejection of Proposal
SSMEDC reserves the right to reject any or all proposals and to waive formalities as the interest of SSMEDC may require without stating reasons.
Notwithstanding and without restricting the generality of the statement immediately above, SSMEDC will not be required to award and accept a proposal:

- When only one (1) proposal has been received as a result of the current Request for Proposals;
- Based on price (i.e. lowest price);
- Where the lowest quotation by a Vendor substantially exceeds the estimated cost of the project;
- When all proposals received fail to comply with the specifications or proposal terms and conditions;
- Where a change in the scope of work or specifications is required; and/or
- Where the proposal documents do not state a definite work schedule and a submitted proposal is based on an unreasonable work schedule.

Responsibility for Damages
The successful Vendor will indemnify and save harmless SSMEDC against all claims, demands, loss, cost, damages, actions, suits or other proceedings by whomsoever made, brought or executed by, or attributed to any such damages, injury or infringement as a result of activities under this proposal.
Protection of Work and Property

The successful Vendor will provide continuous and adequate protection of all work from damage and will protect SSMEDC’s property from injury or damage arising from or in connection with this work. The successful Vendor will make good any such damage or injury.

Cancellation

SSMEDC reserves the right to immediately terminate the contract for sufficient cause, including but not limited to such items as non-performance, late deliveries, inferior quality etc.

If the Vendor should neglect to execute the work properly or fail to perform any provision of this award, SSMEDC after three (3) days written notice to the Vendor, may without prejudice to any other remedy in existence, make good such deficiencies and may deduct the cost thereof from any payment then and thereafter due to the Vendor. Continued failure of the Vendor execute the work properly will result in the termination of the contract following written notice.

Either party may terminate the contract by giving the other party thirty (30) days written notice, giving reasons acceptable to the other and subject to approval by both parties involved in the contract.

Failure to maintain the required documentation during the term of this contract may result in suspension of the work activities and/or cancellation of the contract.

Confidentiality Understanding

The successful Vendor and its employees/associates may have access to information confidential to SSMEDC. This information may include, but is not limited to, terms of the agreement, business methods and systems, contractual terms, pricing, personal information etc. subject to disclosure by law, the successful Vendor agrees that it and its employees/associates who have access to this information will not either during the term of the agreement or at any time thereafter reveal to any third party any of this confidential information or use in any way, whether on the successful Vendor’s behalf or on behalf of any third party, any such information. The obligations of this section survive the expiration or termination of this agreement indefinitely.

Freedom of Information

The content of the proposal and all documentation of information submitted shall be held in confidence by SSMEDC subject only to the provision of freedom of information and privacy legislation, including without limitation the Municipal Freedom of Information and Protection of Privacy Act. All written proposals received by SSMEDC become a public record, once a proposal is accepted by SSMEDC and a contract is signed, all information contained in it is available to the public including personal information.

Any personal information required in the proposal is received under the authority of SSMEDC. This information will be an integral component of the quote submission.

Sub-Consultants

The use of appropriate and credible sub-consultants by the Vendor to perform portions of the project is permitted.

Ownership

The information, reports, documentation, plans, etc. that are a product of this award by the successful Vendor, will become the exclusive property of SSMEDC. However, intellectual property, such as specific tools, templates, processes, etc. that the Vendor has provided as part of the deliverables for this project (i.e. job descriptions) remains the property of the Vendor and the Vendor is free to use any of such material in other contexts and with future clients.
Project Assumptions

1. The Consultant will have access to the appropriate people, reports, files and information.
2. Any decision regarding approach and results will be made in consultation with SSMEDC.

Parties

The parties to be involved in the project and acceptance of the Report are the Executive Committee or designate and the CEO. Point of contact during the project will be the CEO or designate.

Intellectual Property

The Report and all information contained within the final product is the intellectual property of SSMEDC and may be used at the sole discretion of SSMEDC.

Proposal Selection Process

- A consultant selection committee may be comprised of SSMEDC Executive Committee designate, CEO, and senior managers; City Representatives and external members selected by the CDC. The Sault Ste. Marie Economic Development Corporation has the right to negotiate with the proponents who presented the most attractive proposal.
- The Sault Ste. Marie Economic Development Corporation shall have the final authority on all matters regarding the Request for Proposal.

Selection Criteria

While the following are the selection criteria that will guide SSMEDC’s evaluation of the Vendor proposals, SSMEDC may not limit it to these criteria, and may also take into account additional considerations. The sequencing of the criteria does not suggest or imply their relative weighting. The criteria include:

- Vendor’s demonstrated knowledge, experience, and successes with Pay Equity legislation
- Vendor’s demonstrated knowledge, experience and successes overall and particularly in relation to similar projects. This will include the qualifications of individuals assigned to the project and their availability.
- Vendor’s project management experience in supervising any subcontractors and delivering a seamless product to the client.
- Client references for relevant projects. Provide at least three (3) references from three (3) different organizations with current contact information.
- Quality of proposal. This includes the level of detail and quality/thoroughness of recommendations and providing a clear project plan that identifies critical milestones.
- Ability to stay within project budget and meet project completion target date.
- Any features of advantages uniquely proposed by the Vendor with SSMEDC has not identified in the project deliverables or description.
• Vendor’s financial proposal (including itemized breakdown of costs for Parts A and B, fee structure, projected expenses).

• Evidence of local content in support of small business in Sault Ste. Marie.

Upon ranking of the RFP, the top firms may be contacted by phone or email if clarification is needed and to explore any gaps in information.

**Budget**

Proponents are advised that the general budget allocation for all parts of this project will not exceed a combined total of $25,000 CDN inclusive of all taxes and disbursements.

Proponents are advised that explicit agreement should be provided indicating that the quoted price is good for sixty (60) days.

**Attachments**


2. SSMEDC Website [www.sault-canada.com](http://www.sault-canada.com)