



REQUEST FOR PROPOSAL

Harvey Rural Community, New Brunswick Strategic Planning Services

RFP #HRC-2024-01

Issue Date: April 16, 2024

RFP | 5-Year Strategic Plan (2025 – 2030)

1. **Objective:**

Harvey Rural Community is seeking competitive proposals from qualified and professional consultants with strategic planning expertise, ideally in the municipal context, to assist with the development of a Strategic Plan. The Strategic Plan should also serve as a guide to the Municipality in addressing opportunities and challenges that are being implemented by the provincial government regarding local governance reform.

2. **Purpose:**

The 2025-2030 Strategic Plan (The “Plan”) will guide the decisions of Council over the next 5-years and shape the future of our community, and convey our vision, mission, values and strategic goals to the residents of Harvey Rural Community (“HRC”).

3. **Background:**

Harvey Rural Community was officially established on January 1, 2023, as a result of New Brunswick’s comprehensive local governance reform. This marked one of the most substantial local governance restructurings in the province’s history, aiming to modernize the system, reduce redundancies, and provide better service delivery.

HRC was officially formed by amalgamating the Village of Harvey with parts of four local service districts – Manners Sutton, Dumfries, Prince William, and Kingsclear.

This amalgamation allowed the community to pool resources, better manage service delivery, and provide a more unified voice for its residents. HRC now represents a diverse and dynamic entity, better equipped to face the future’s challenges and opportunities.

Being newly incorporated with one year into formation, the municipality can now benefit from targeted municipal directives that include development of municipal infrastructure, incentive zoning, inclusionary zoning, and requiring development schemes from developers that outline current and future road networks, dedicated land for public purposes, and hybrid zoning for a balanced neighbourhood (residential, institutional, recreational, commercial). The Plan will aid in the development of these long-term-objectives.

4. **Our Mission**

To serve, unify, preserve and support the communities of Harvey Rural Community. Foster growth and build a strong, inclusive community. Provide a safe and opportunistic environment for the entire municipality through responsible governance.

5. **Our Vision**

A thriving municipality exemplifying a beautiful, rural lifestyle surrounded by nature. Uniting people, partnerships, and possibilities for a strong and vibrant Harvey Rural Community.

6. **Our Values**

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Harvey Rural Community is a community of communities united by its heritage, natural environment and common future. Harvey Rural Community is committed to four values: **Community, Communication, Collaboration and Future Focus.**

- a. **Community:**
Create a unified and inclusive municipality that recognizes the uniqueness of individual communities.
- b. **Communication:**
Demonstrate open and transparent communication and foster relationships in which people feel valued, trusted, safe and supported.
- c. **Collaboration:**
Support and encourage community partners to work together for the betterment of the community through collaborative use of knowledge, creativity and resources.
- d. **Future Focus:**
Develop an environment that is conducive to growth while considering the long-term implications of our decisions and respecting a rural quality of life.

These values serve as a foundation to help guide our behaviour and play an important role in the decisions and actions of the Municipality.

7. **Project Scope:**

Harvey Rural Community is seeking the services of a consultant to:

- a. Assist in the development of a Strategic Plan that will focus on the community's values and vision for the future, as well as provide concrete goals and objectives via an action plan.
- b. Engage business and community stakeholders, residents, Council, municipal personnel and other key agencies and/or individuals in the process of developing the Plan.

The work product of the consultant to include the following components:

- c. examination of all matters related to future development of the municipality.
- d. coordination and facilitation of a consultation process that includes input from Council, staff, residents, and key stakeholders.
 - i. Initial start-up meeting with the Chief Administrative Officer (CAO) and senior staff.
 - ii. Consultation sessions with business and community stakeholders.
 - iii. Consultation with residents via surveys, town halls and public open house event(s)
 - iv. Consultation sessions with Council and staff.
 - v. Presentation of the draft Strategic Plan to Council and staff.
- e. Research of the existing reference documents as listed in Sections 3-6 to familiarize themselves with Harvey Rural Community, including a complete review of all relevant by-laws, strategies, plans, policies and reports.

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- f. Conduct a SWOT analysis to identify the municipality’s strengths, weaknesses, opportunities, and threats.
- g. Review the current status of the Harvey Rural Community’s organization, including long-term goals and financial status, and other related research deemed necessary.
- h. Review the impacts that local governance reform will have on the municipality; and preparation of a Strategic Plan for Council’s review that will guide Council and Administration for the next 5 (five) years based on the information gathered at all meetings/stakeholder sessions that includes, as a very minimum, the following:
 - i. Harvey Rural Community’s Mission, Vision, Goals and Objectives.
 - ii. key values and guiding principles to assist direction and decision making.
 - iii. Recommended actions to achieve the strategic vision and goals.
 - iv. Strategic issues relevant to the municipality.
 - v. Performance measurement tools for the implementation phases.
 - vi. An action plan progress dashboard template.
 - vii. Communication and marketing plan ideas with draft plan and timeline.
 - viii. And other relevant information.

8. Project Phases and Objectives

The 2025-2030 Strategic Plan must be successful in meeting the following key objectives within the following phases:

Phase	Description	Outcomes
1	Start-Up	<ul style="list-style-type: none"> • Initial meeting with CAO and Administration to refine as necessary a detailed work plan and schedule for the overall project including the public consultation process. • Determine the priorities of Council in relation to the proposed work.
2	Research	<ul style="list-style-type: none"> • Collect and review existing relevant documents and data including the current Workplan and other in-year reference documents as background information. • Analyze data collected from provincial ministries related to local governance reform and identify any best practices.
3	Background Review and Analysis	<ul style="list-style-type: none"> • Preliminary Report and findings to be shared with the CAO.
4	Consultation and Engagement	<ul style="list-style-type: none"> • Consultation with Council, Staff, and stakeholders. • Public Engagement – organize and facilitate public open house(s). • Utilize focus groups and surveys for public engagement. • Analyze and integrate public input.
5	Proposed Draft Strategic Plan	<ul style="list-style-type: none"> • Draft Strategic Plan presented to Council and CAO • Presentation to the Public via a public meeting offering an opportunity for discussion and feedback from residents
6	Final Strategic Plan 2025 – 2030	<ul style="list-style-type: none"> • Final Strategic Plan to be presented to Council and CAO

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9. Proposal Response Guidelines:

To ensure a proposal is considered for evaluation it should include all the information requested and be presented in the order described below:

a. Cover Letter

A covering letter, dated and signed by a person authorized to negotiate, make commitments, and provide any clarifications with respect to the proposal on behalf of the bidding consultant or firm. Provide a statement indicating your company understands the proposed project and the deliverables required. Provide an indication of any proposed deviations or exceptions to the terms and conditions outlined in this RFP document.

b. Proposed Project Plan

A proposed project plan, methodology and approach with timelines, that indicates the steps to be taken from the start of the contract to the adoption of the Harvey Rural Community Strategic Plan 2025 – 2030.

c. Project Resources

- i. Qualifications and experience.
- ii. Project team.
- iii. Identify the lead consultant and provide a breakdown of qualifications for each member of the project team including:
 - iv. Name
 - v. Role
 - vi. Responsibility
 - vii. Location
- viii. Estimated amount of time each resource will be dedicated to the project; and
- ix. Resumes showing:
 - I. Education
 - II. Professional certifications
 - III. Duration and type of experience

d. References

Please supply three client references for your company or lead consultant, including the name and address of the reference and the name, title, and phone number of the contact person. Describe how the services provided to these references are similar to the services proposed for this project. The supply of a sample of prior work on comparable project(s) would be encouraged.

e. Innovation

Provide details of any possible innovative ideas, suggestions, recommendations, or opportunities for improvement that would enhance the project, work plan, processes, or required outcomes indicated within this RFP.

f. Costs and Charges

Provide an all-inclusive fixed cost quotation. Identify the expected costs and their allocation (i.e. public meetings, professional wages/fees, travel, sub-contracted services, and contingencies) and applicable taxes.

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Harvey Rural Community would also require to be included on the attached proposal submission form, an identified, pre-determined cost for any authorized additional meetings should the need arise.

10. Submission

As a potential supplier of these professional services, you are invited to submit a proposal to provide professional consultant services in accordance with the terms and conditions detailed in this document. Submissions will only be accepted by e-mail.

Proponents should submit one complete electronic copy, in Adobe (.pdf) format, of their proposal with the following file name: **“Harvey Rural Community - REQUEST FOR PROPOSAL - RFP 2024-01-StratPlan.”** Please note that submissions will not be accepted by fax. Any proposals received after the closing date and time will be disqualified.

Proposals shall be e-mailed to the attention of:

Harvey Rural Community
Attention: Shawn Hawley, Chief Administrative Officer
ShawnHawley@HarveyRuralCommunity.ca
58 Hanselacker St, Harvey, NB E6K 1A3

Closing date and time: Friday, 03 May 2024, at 4:00 p.m. Atlantic Standard Time (AST)

11. Review Schedule

RFP Release Date: 16 April 2024

Last Day for Written Questions: 26 April 2024

RFP Closing Date: 3 May 2024, 4:00 PM Atlantic Standard Time (AST)

Evaluation of Submissions: 7 May 2024

Review and Selection of Consultant: by 10th of May 2024

Upon closing, the CAO and senior staff will review all submissions for completeness. Only complete proposals will be brought forward to Council for further consideration. Eligible submissions will be evaluated based on the response guidelines in Section 9 (Response Guidelines).

The CAO’s recommendations to Council will be based on the consultants’ qualifications and knowledge, demonstrated work experience, depth of expertise, financial considerations, quality of approach and methodology, and the proposed work plan schedule.

Proposals will not be opened in public.

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12. Inquiries

No pre-submittal information meeting will be held for this RFP.

Inquiries, interpretations, and questions regarding this RFP are to be directed in writing, to Shawn Hawley, CAO (ShawnHawley@HarveyRuralCommunity.ca). No other contacts shall be relied upon with respect to inquiries on matters relating to this RFP.

Inquiries and responses will be recorded and may be distributed to all Proponents at the Municipality’s discretion.

Written e-mail questions may be received up to 26 April 2024. Verbal questions may be asked at any time during regular business hours of the municipal office, however verbal responses are not binding on either party.

Harvey Rural Community may determine it is necessary to revise any part of this RFP. Revisions will be made by written addenda and it is the Proponent’s responsibility to check for, understand and comply with addenda which will be posted on the municipal website at <https://harveyruralcommunity.ca>.

13. Period of Agreement

The term of any contractual agreement will be from the date of award up to 11 October 2024. All necessary documents must be provided in final form, approved by senior staff, and submitted for adoption by Council no later than 09 September 2024, unless otherwise negotiated and agreed upon in advance with the CAO.

14. Contract Negotiation

Harvey Rural Community’s CAO will negotiate a contractual agreement with the preferred consultant. If the CAO is unable to negotiate an acceptable contractual agreement with the preferred consultant, then the second preferred consultant may be selected, and a contractual agreement developed. Harvey Rural Community, at any time and without liability, may withdraw from negotiations with any potential consultant.

15. Selection

The Selection Committee will consist of the CAO and other members of the administrative team. The selection will be based on the following:

- a. Selection Criteria – a total of 100 points will be allocated to each proposal, as follows:

<i>CATEGORY</i>	<i>AVAILABLE POINTS</i>
<i>TECHNICAL</i>	

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Qualification and Experience of Company	10
Qualification and Relevant Experience of Project Team	10
Understanding of Objectives	10
Experience in Developing Strategic Plans for Municipalities and/or Industry Associations	10
Quality of Approach, Methodology, and Innovation (Work Plan)	25
Proposed Work Plan Schedule	15
Sub-total:	/80
FINANCIAL	
Fees and Disbursements (including sub-consultants)	20
Total	/100

- b. Financial points will only be awarded to submissions that have achieved a minimum score of 60 out of 80 points on the technical evaluation criteria. Proposals that do not meet this minimum score will be deemed non-compliant and will be given no further consideration.
- c. Technical proposals scoring 60 points or higher will be evaluated financially, on the following basis: the proposal submitted with the lowest cost will be awarded 20 points; and points will be awarded to the other cost proposals according to the ratio of the cost submitted to the lowest cost submitted, e.g.: $COST\ PROPOSAL\ POINTS = 20 / (Proposal\ Cost / Lowest\ Cost)$
- d. Up to 3 (three) of the highest rated proposals may be invited by the Municipality to attend an interview to present and discuss their proposal. Interview details and evaluation criteria will be provided at the time of notification of request to attend an interview.
- e. Harvey Rural Community reserves the right to reject any or all proposals and to accept the proposal deemed most favorable to the interests of the Municipality.

16. Terms and Conditions

- a. This is an invitation for proposals and not a tender call. HRC does not intend to and does not assume or owe any contractual or other duties or obligations as a result of the issuance of this RFP, the preparation or submission of a proposal by a Proponent, the receipt, opening and consideration of a proposal, the evaluation of proposals, provision of additional information or conduct of presentations, the proponent’s participation in any discussions or negotiations, or on any other basis whatsoever arising out of this RFP. Without limiting the generality of the foregoing

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and for certainty, no contract is formed by the submission of a proposal in response to this RFP.

- b. Submission of a proposal shall not obligate HRC to accept any such proposal or to proceed further with the project. The Municipality may, in their sole discretion, elect not to proceed with the proposal, and may elect not to accept any or all proposals for any reason.
- c. HRC will not be liable for any expenses incurred by consultants responding to this RFP.
- d. At all times, the consultant has the responsibility to notify HRC, in writing, of any ambiguity, divergence, error, omission, oversight or contradiction contained within the proposal as it is discovered.
- e. Consultants may amend or withdraw their proposals prior to the closing date and time specified in the RFP by way of written or e-mailed notice to HRC's Chief Administrative Officer. After the closing date and time, proposals may not be withdrawn.
- f. Any correspondence with elected officials, employees, or other agents of HRC may be subject to disclosure under the provisions of the Right to Information and Protection of Privacy Act of the Province of New Brunswick.
- g. Proposals submitted shall be final and may not be altered by subsequent offerings, discussions, or commitments unless the consultant is requested to do so by HRC.
- h. The consultant must identify any information in its proposal that it considers confidential or proprietary.
- i. There will not be a public opening. All proposals and accompanying documentation received under this process will become the property of HRC and will not be returned.
- j. HRC has reserved the right to waive minor non-compliance by a consultant with the requirements of the RFP. This will allow HRC to consider and possibly accept any proposal which is advantageous even though the proposal may be non-compliant in some minor respect.
- k. HRC reserves the right to cancel and/or re-issue this RFP at any time for any reason without penalty.
- l. Prices quoted are to be held firm for a minimum of 120 days following the RFP closing date and shall remain in effect through the duration of the agreement.
- m. The consultant's proposal shall form part of the contractual agreement by attachment and will be incorporated by reference. Claims made in the proposal shall constitute contractual warranties. Any provision in the proposal may be included in the contractual agreement as direct provision thereof.
- n. The successful consultant agrees to obtain and maintain all professional certifications and licenses necessary to lawfully provide the services required under this request for proposal.

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PROPOSAL SUBMISSION FORM

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CLOSING DATE: 03 May 2024, 4:00 PM AST

Harvey Rural Community

PROPOSAL PRICE FOR THE PREPARATION OF THE HARVEY RURAL COMMUNITY 2024-2029 Strategic Plan AS PER HARVEY RURAL COMMUNITY SPECIFICATIONS:

Proposal Price: \$ _____

HST: \$ _____

Total Proposed Price: \$ _____

Authorized Additional Meeting

Cost: \$ _____

HST: \$ _____

Total: \$ _____

THE LOWEST COST PROPOSAL, OR ANY PROPOSAL, MAY NOT NECESSARILY BE ACCEPTED.

Submitted By:

(Company Name)

(Mailing Address)

(City)

(Postal Code)

(Phone No.)

(Phone No. 2)

(Signature)

(Date)