



{de·fine} HRM



Request for Proposal
HRM Rebranding Project
RFP #P13-083
Closing: Tuesday August 13, 2013 at 2:00 pm local time

Non-mandatory RFP information session for proponents July 26, 2013 at 2 p.m. in Halifax Hall,
City Hall, 1841 Argyle St., Halifax

Halifax Regional Municipality
Procurement Section
Suite 103, 1st Floor,
40 Alderney Dr. (Alderney Gate),
Dartmouth Nova Scotia
B2Y 2N5



July 2013

NOTICE

REQUEST FOR PROPOSAL #P13-083

Halifax Regional Municipality Rebranding

The Halifax Regional Municipality (HRM) seeks proposals from qualified individuals/firms to provide brand consulting and public engagement services as part of a brand development project that Regional Council directed staff to undertake. This RFP is seeking proposals for the design, development and delivery of a potential new master brand as well as a broad community and stakeholder engagement program on this topic.

Target groups to be engaged will include the local HRM community at large and stakeholders such as the cultural, multicultural, academic and business communities. Reference documents include focus groups done in early 2013 into civic attributes as well as similar exercises with business stakeholders led by the Greater Halifax Partnership (GHP).

The successful proponent will develop options based on feedback from both face-to-face and online engagement sessions, as well as help promote attendance, capture feedback, support/be supported by HRM staff, integrate consultation results and draft a report on the results. This will form the basis for brand development and recommendations back to Regional Council in early 2014.

Sealed Proposals, six (6) copies, four (4) bound, one (1) in digital format on USB flash drive and one (1) unbound, for the Halifax Regional Municipality Rebranding Project, RFP # P13-083, Halifax Regional Municipality, Halifax, Nova Scotia, will be received by Halifax Regional Municipality Procurement Section, Suite 103, 1st Floor, 40 Alderney Dr. (Alderney Gate), Dartmouth, Nova Scotia, B2Y 2N5, until 2:00 pm local time, Tuesday August 13, 2013, 2013. Proponents are advised that Canada Post does not deliver to the Procurement Office.

All questions concerning the procurement process shall be directed to Stephen Terry, Senior Procurement Consultant, at (902) 490-2175, Monday through Friday, 8:30 am to 4:30 pm or email to terryst@halifax.ca. Questions related to the branding process should be directed to Bruce DeBaie at debaieb@halifax.ca or phone (902) 490-2047.

Instructions, forms, and specifications may be obtained from the Halifax Regional Municipality Procurement Office, (902) 490-4170, Fax (902) 490-6425, Mon. to Fri., 8:30 am to 4:30 pm.

HRM reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever in its opinion best serves the interest of HRM.

Anne Feist, Manager
Procurement

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Introduction: Creating a transformational new brand for HRM

Dorothy was right – there is no place like home. But what makes “home”? What makes us who we are, what drives our inner core, and most importantly, how do we capture that in a brand? For nearly two decades, the municipality has publicly been known by its legal name—Halifax Regional Municipality (or “HRM”)—following the amalgamation of distinct municipalities within the region. The collective identity of the city has evolved since then, but neither in a cohesive nor consistent manner. We’re now looking for a proponent to help us better present what we are all about.

A place brand is more than simply a logo or a catch phrase; it’s the sum of all the emotions and expressions that connect us to each other and to the world. Whether it’s our famous natural spaces, our diverse music and regional cuisine, or our enviable position as an economic and academic hub for the region, we have an abundance of natural and social riches. We’re a community that cares deeply about each other and our quality of life.

We’re also a community that must better position local businesses to be competitive and successful in the global market for jobs, talent and tourism. The Greater Halifax Partnership (GHP) is working on this challenge and consulted businesses, academics, not-for-profits and governments on the need for a brand renewal that supports a better international image for HRM. GHP conducted research and presented to Council on this need, and has embedded a brand deliverable in its current economic strategy.

To help capture the mix that has been expressed by both the business community and the public, Regional Council directed HRM staff to explore and develop options for a new place brand that is authentic, distinct and reflects our strongest and best core attributes to each other and the world.

Yet this isn’t just about selling ourselves; it’s a big step in helping to reinforce our positive reputation and image by capturing, synthesizing and reflecting the best qualities of our home. We know HRM citizens are looking for something not yet defined—an expressive, shared sense of identity to which they can rally and support. Yes, it’s a tall order, practically a once-in-a-generation challenge, so be sure to bring your best and brightest to the table.

For these reasons, HRM seeks the services of an exceptionally well-qualified and experienced consultant (Firm) to help engage, facilitate, define, develop, present and implement a new and transformational brand for the municipality, one that reflects our identity and values in an original and unique way and captures the imagination of all.

The proposal will be delivered in phases: following the project definition, the successful Firm will undertake broad public engagement to confirm the foundational characteristics and viewpoints of citizens, distinct communities, businesses and stakeholders. Those findings will be incorporated into the ultimate brand recommendation to Regional Council. Mayor and Regional Council will also act as brand champions and be involved in encouraging citizens to take part in this exciting initiative.

GHP has already verified the need for a more robust, international brand as part of the creation of the economic strategy, and will lead the further engagement with the business community and other stakeholders with support from the proponent.

The successful proponent will work with HRM staff and GHP to help design and deliver the engagement to ensure that the approach and content are thorough, inclusive and innovative. Components for engagement will include web based and social media channels, public events, best practice references and interactive elements to focus on our core characteristics and use them to develop and launch a new place brand.

An information session will follow the initial posting of this RFP on July 26 to assist proponents with their proposals.

1.0 GENERAL INSTRUCTIONS

1.1 Instructions and the Terms of Reference

INSTRUCTIONS AND FORMS: The Request for Proposal document may be obtained in person or by mail from, Halifax Regional Municipality Procurement Section, Suite 103, 1st Floor, 40 Alderney Dr. (Alderney Gate), Dartmouth Nova Scotia, B2Y 2N5, or via download at <https://www.gov.ns.ca/tenders/tenders/ns-tenders.aspx>

- (a) All proposals are to be submitted in accordance with this Request for Proposal document.
- (b) All proposals are to be submitted in sealed, plainly marked envelopes. Proposals sent by facsimile or e-mail will not be accepted.
- (c) Additional information or clarifications of any of the instructions or information contained herein may be obtained from HRM Procurement Office.
- (d) Any proponent or proponents finding any discrepancy in or omission from the proposal, in doubt as to their meaning, or feeling that the proposal is discriminatory, shall notify HRM Procurement Office in writing within 5 days of the scheduled opening of proposals. Exceptions as taken in no way obligate HRM to change the proposal. HRM Procurement Office will notify all respondents in writing, by addendum duly issued, of any interpretations made of proposal instructions.
- (e) HRM will assume no responsibility for oral instructions or suggestion. All official correspondence in regard to the proposal should be directed to and will be issued by the Manager of Procurement, Halifax Regional Municipality.
- (f) All Proposals must be signed by an authorized signatory of the Proponent.
- (h) HRM reserves the right to make additional copies of all or part of the Proponent's Proposal for internal use or for any other purpose required by law.
- (i) Proposals will be publicly acknowledged but cost proposals will NOT be publicly opened. Proponents will be advised of the results after an evaluation of all Proposals has been completed and a successful Proponent has been determined.

1.2 Eligibility

Prospective proponents are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of HRM, give rise to conflict of interest in connection with this project. Proponents are to submit with their proposal documents any issue that may constitute a conflict of interest violation for review by HRM. HRM's decision on this matter will be final.

1.3 Reservations

- (a) HRM reserves the right to reject or accept any or all proposals or parts of proposals, when in this reasoned judgment, the public interest will be served thereby.
- (b) HRM may waive formalities or technicalities in proposals as the interest of HRM may require.

- (c) HRM may waive minor differences in the proposal provided these differences do not violate the proposal intent.

1.4 Modifications/Addenda

HRM may, at any time prior to the closing date and time, issue additional information, clarifications or modifications to the RFP by written addenda issued by the Operations Manager of Procurement or his/her designate only. It is the Proponent's sole responsibility to ensure they have received all addenda prior to submitting their Proposal.

1.5 Proponents Expenses

Proponents are solely responsible for their own expenses in preparing, delivering or presenting a proposal and for subsequent negotiations with HRM, if any.

1.6 Exceptions

The submission of a proposal shall be considered an agreement to all the terms and conditions provided herein and in the various proposal documents, unless specifically noted otherwise in the proposal.

1.7 Currency and Taxes

Prices are to be quoted:

- In Canadian dollars;
- Inclusive of duty, where applicable;
- Exclusive of HST.

1.8 Compliance with Laws

The proponent will give all the notices and obtain all the licenses and permits, required to perform the work. The proponent will comply with all laws applicable to the work or performance of the contract.

1.9 Period of Submission Validity

Proposals will be binding 60 Days: Unless otherwise specified, all formal proposals submitted shall be irrevocable for 60 calendar days following proposal opening date, unless the respondent(s), upon request of the Purchasing Agent, agrees to an extension.

1.10 Disputes

In cases of dispute as to whether or not an item or service quoted or delivered meets proposal requirements, the decision of HRM, or authorized representatives, shall be final and binding on all parties

1.11 Grounds for Disqualification

The proponent shall direct all questions regarding this RFP or the Project to the individuals identified in Section 2.3 of this Document (Contract Administration). Any attempt on the part of the Proponent or any of its employees, agent, contractors or representatives to contact any of the following persons with respect to this RFP or the Project may lead to disqualification:

- (a) any member of the evaluation team (except those mentioned in this document) or any expert advisor to them;
- (b) any member of Council; and
- (c) any member of HRM staff

2.0 ADMINISTRATION

2.1 Background

The Halifax Regional Municipality was formed on April 1, 1996, through the amalgamation of the former City of Halifax, City of Dartmouth, Town of Bedford, Halifax County Municipality, and Metropolitan Authority. The new municipality spans a geographic area of 5,600 square kilometres and provides municipal services to a population of approximately 408,200. These services include such typical municipal functions as police and fire protection, community development and planning, engineering and public works, sewage treatment, parks and recreation facilities, solid waste management and public transit.

2.2 General

Time is of the essence in the contract resulting from this proposal. The deadline for delivery of the approved final report is in the Fall of 2013 (please see timelines).

2.3 Contract Administration

All questions concerning the procurement process shall be directed to Stephen Terry, Senior Procurement Consultant, at (902) 490-2175, Monday through Friday, 8:30 am to 4:30 pm or email to terryst@halifax.ca. Questions related to the branding process shall be directed to Bruce DeBaie, Managing Director, Corporate Communications at (902) 490-6787 or debaieb@halifax.ca.

2.4 Information Session/Questions/Addenda

Each proponent must completely satisfy themselves as to the exact nature and existing conditions of the requirements and for the extent and quality of work to be performed. Failure to do so will not relieve the successful proponent of their obligation to carry out the provisions of the contract.

2.4.1 Non-mandatory RFP information session for proponents July 26, 2013 at 2 p.m. in Halifax Hall, City Hall, 1841 Argyle St., Halifax

2.4.2 Questions

The proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open. Questions should be directed in writing to the contacts identified in this document. **Email is the preferred method of contact.** Verbal questions and responses that are not later confirmed in writing will not be considered an official response.

Questions and responses that are deemed to materially affect the RFP requirements, project scope, time lines, etc. or to be of interest to all prospective proponents **may** be made available via Addenda at the sole discretion of the HRM

2.4.3 Addenda

Proponents are responsible to ensure that they are aware of and have complied with any addenda issued by visiting the Nova Scotia Public Tenders Website.

Responding to this RFP **may** require the acknowledgement of a specific addendum or multiple addenda as part of the submission. Acknowledgement requirements, whether optional or mandatory, will be defined in the addendum. The proponent must monitor for any addenda that may be issued during the full open period of the RFP. Addenda shall be posted on the Nova Scotia Public Tenders website and it is the sole responsibility of the respondent to ensure that any addendums are read, understood, and where necessary, acknowledged.

2.5 Proponent's Qualifications

No contract will be awarded except to responsible proponents capable of providing the services contemplated.

Proponents must be primarily engaged in providing the services as outlined in this Request for Proposal.

Proponents shall be independent of and not affiliated with any prime service provider or manufacturer.

Proponents must have a comprehensive understanding in the areas listed in this Request for Proposal. Understanding and previous experience in all aspects of similar projects is essential criteria in the qualifying process.

Proponents shall have a proven record of having provided this service requirement. HRM reserves the right to check all client contacts/references furnished and consider the responses received in determining the award of this proposal.

The proponent's personnel and management to be utilized in this service requirement shall be knowledgeable in their areas of expertise. HRM reserves the right to perform investigations as may be deemed necessary to insure that competent persons will be utilized in the performance of the contract.

The proponent must be currently in service of providing the work associated with this project and have been engaged in this field.

2.6 Indemnity

If the contract is awarded, the successful Proponent will hold harmless, indemnify and defend HRM, its Officers, Officials, Employees, Agents and Volunteers from and against any claim or loss howsoever caused, including, actions, suits, liability, loss, expenses, damages and judgments of any nature, including reasonable costs and attorneys' fees in defense thereof, for injury, sickness, disability or death to persons or damage to property or business, caused by or arising out of the successful Proponent's acts or those of their subcontractor (s), supplier (s), licensee (s), anyone directly or indirectly employed by any one of them or anyone for whose acts any of them is liable and for any of their errors or omissions in the performance of this Contract.

The successful Proponent's obligation under this provision will not extend to injury, sickness, disability, death or damage caused by or arising out of the sole negligence of HRM, its Officers, Officials, Employees, Agents or Volunteers.

With regard to any claim against HRM, its Officers, Officials, Employees, Agents and Volunteers by any employee of the successful Proponent, subcontractor, anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, the indemnification obligation under this Section will not be limited in any way by any limitation on the amount or type of damages, compensation or benefits payable by or for the successful Proponent or subcontractor under Worker's Compensation Acts, Disability Benefit Acts or other Employee Benefit legislation.

The successful Proponent's obligations under these provisions include, but are not limited to, investigating, adjusting and defending all claims alleging loss from action, error or omission, or breach of any common law, statutory or other delegated duty by the successful Proponent, their employees, agents or subcontractors.

Relative to acceptance of contracted property or work completed under contract by HRM, any property or work to be provided by the successful Proponent under this Contract will remain at their risk until they are provided with written acceptance by HRM. The successful Proponent will replace at their expense, all property or work damaged or destroyed by any cause whatsoever.

The successful Proponent's obligation under this Indemnification Section will survive the expiry or early termination of this Contract.

2.7 Insurance Requirements

The Proponent shall provide proof of Professional Errors and Omissions Insurance for all design professionals (such as architects, landscape architects or engineers) who provide the Proponent with signed stamped drawing or calculations. Such insurance shall have

limits not less than \$2,000,000 each claim with respect to negligent acts, errors and omissions, and any deductible may not exceed \$50,000 each claim. The Proponent shall obtain such insurance when the Proponent subcontracts for any work from such a design professional, and prior to the submittal of Construction Documents. Any design professional required to obtain professional liability insurance must maintain proof of insurance for the term of this Agreement.

If requested at any time by HRM, the proponent will be required to provide General Liability Insurance in a form acceptable to HRM, with HRM as a named party. The amount of coverage will be \$2,000,000.

If requested at any time by HRM, the Proponent shall provide automobile liability insurance in respect to owned licensed vehicles subject to limits of not less than Two Million Dollars (\$2,000,000) inclusive.

If requested at any time by HRM, the Proponent shall provide automobile liability insurance in respect to non-owned licensed vehicles subject to limits of not less than Two Million Dollars (\$2,000,000) inclusive.

If the Proponent is legally obliged to be covered by Workers' Compensation and Health and Safety regulations, the Proponent shall provide evidence of his coverage and that the premiums have been paid and are up-to-date. Proponent shall also be responsible for obtaining and providing evidence that any Subcontractor is also covered as required by law.

2.8 Method of Purchase

A purchase order will be issued by the Procurement Office for all services performed under this contract prior to the actual services being started.

2.9 Billing and Payment

The proponent shall submit a detailed invoice for services provided to both the Project Manager and the Accounts Payable Department at the following address:

**Halifax Regional Municipality
P.O. Box 1749, Halifax, Nova Scotia
B3J 3A5
Attn: Accounts Payable**

The invoice shall contain the following information:

**Purchase Order Number;
Period of Work;
Itemized List of Services Provided;**

- Time spent by each employee on the project in the billing period
- Expenses incurred on the project during the billing period
- A total showing how much money is billed in the current billing period
- A running total showing how much money has been billed previously
- Total billed to date (i.e., current plus previous invoices)
- Show the HST applicable to the entire billing
- A total showing how much is payable on the invoice.

Invoices beyond the original agreed value will not be accepted unless written consent from HRM is obtained. Invoices for extra work must be submitted separately and must be accompanied by a written justification of the work. **(Note: Written authorization from HRM is required prior to proceeding with any extra work.)**

The proponent shall invoice up to 90% of the original agreed value, the remainder, shall be invoiced upon successful completion of the work called for in the terms of reference.

Payment shall be made upon request of a proper invoice from the proponent and authorized by the head of the department or designee. Normal payment terms for the HRM are 30 days from receipt.

2.10 Exceptions

2.10.1 The proponent shall furnish a statement on company letterhead clearly identifying and giving complete description of all exceptions to the terms, conditions and specifications. Failure to furnish the statement will indicate that the proponent agrees to meet all requirements of the Request for Proposal and that if a contract is awarded, the successful proponent for this RFP agrees to enter into a purchase agreement with HRM which binds the proponent to all terms and conditions and deliverables as stated in this document and its appendices.

2.10.2 The HRM reserves the right to reject any proposal that is in conflict with the Municipality's Standard Terms and Conditions.

2.11 Termination

- (1) Termination for Convenience: The HRM may terminate a contract, in whole or in part, if determined that such a termination is in its best interest, without showing cause, upon giving written notice to the proponent. The HRM shall pay all reasonable costs incurred by the proponent up to the date of termination. However, in no event shall the proponent be paid an amount which exceeds the bid price for the work performed. The proponent shall not be reimbursed for any profits which may have been anticipated but which have not been earned up to the date of termination.
- (2) Termination for Default: When the proponent has not performed or has unsatisfactorily performed the contract, HRM may terminate the contract for

default. Upon termination for default, payment will be withheld at the discretion of HRM. Failure on the part of the proponent to fulfill the contractual obligations shall be considered just cause for termination of the contract. The proponent will be paid for work satisfactorily performed prior to termination, less any excess costs incurred by HRM in re-procuring and completing the work.

2.12 Availability of Funds

The contractual obligations of HRM under this contract are contingent upon the availability of appropriated funds from which payment for this contract can be made.

2.13 Interpretation

The contract resulting from this Request for Proposal shall be construed under the laws of the Province of Nova Scotia.

2.14 Integration

All proposals received shall become the property of HRM. This Request for Proposal document, the proponent's response to this solicitation, and subsequent purchase order(s) to the successful proposal contain the entire understanding between parties, and any additions or modifications hereto may only be made in writing executed by both parties.

2.15 Non-assignment of Contract

The proponent shall not assign the contract, or any portion thereof, except upon the written approval of HRM.

2.16 Public Information/Proprietary Information

HRM is subject to the Freedom of Information and Protection of Privacy provisions contained within the *Municipal Government Act* at Part XX. This can be found online at: <http://www.halifax.ca/irm/Leg.html>. Any document submitted to the Municipality in response to this Request for Proposals is subject to this legislation and Respondents should be aware that any member of the public is entitled to request a copy of the document. In response to such a request, HRM 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).

HRM is also subject to the *Personal Information International Disclosure Protection Act*. This can be found online at: <http://www.halifax.ca/irm/Leg.html>. The Act creates obligations for HRM and its service providers when personal information is collected, used or disclosed. Requirements include limiting storage, access and disclosure of personal information to Canada, except as necessary or otherwise required by law.

By submitting a proposal, the proponent agrees that HRM may disclose the following sections of the proposal without notification to the proponent:

Section 6.1.1 and subsections 6.1.1.1, 6.1.1.2, 6.1.1.3, and 6.1.1.4: General Information

Section 6.2.2 Proponent's fixed firm total fee

2.17 Privacy

In compliance with section 5(1) of the *Personal Information International Disclosure Protection Act* (PIIDPA), HRM is required to ensure that any person information in its custody or control, which includes personal information that may be held by any of its service providers, is stored and accessed only within Canada, unless the storage of or access to the information outside of Canada is to meet the necessary requirements of its operations.

The respondent, if successful, will become the service provider and will be subject to this legislation. As such, the respondent must clearly identify whether they are able to meet the PIIDPA requirements of storage of and access to personal information only within Canada.

The proposed solution must not permit the collection, use and/or disclosure of any personal information (as defined by section 461(f) of the *Municipal Government Act*) without the consent of the individual.

In the event that the Canadian vendor is acquired by a non-Canadian company, the Canadian vendor would no longer comply with the requirements of PIIDPA. Prior to the completion of any such acquisition, the Canadian vendor shall notify HRM of the proposed acquisition. The Canadian vendor agrees, at no cost to HRM and upon reasonable notification from HRM, to provide to HRM all HRM data in electronic format, and to completely purge all HRM data, including backups, from the Canadian vendor's possession prior to the completion of the acquisition. A certificate from an independent third party verifying that all data, including backups, has been purged shall be provided to HRM prior to the acquisition of the Canadian vendor by a non-Canadian company. Acceptable third parties include professional accountants, certified auditors and IT professionals.

2.18 Contract Agreement

The selected proponent will be required to enter a contract agreement in agreement with HRM's Terms and Conditions for Goods, Services and Standing Offers. The contract shall be executed via purchase order duly signed by the Manager of Procurement.

2.19 Relationship of parties

It is clearly understood that each party shall act in its individual capacity and not as an agent, employee, partner, joint venturer, or associate of the other. An employee or agent of one party shall not be deemed or construed to be the employee or agent of the other party for any purpose whatsoever. The Proponent is an independent contractor in the

performance of work and the provision of services under this Contract.

2.20 Intellectual Property Rights

HRM will be the owner of the intellectual property rights, including patent, copyright, trademark, industrial design and trade secrets in any deliverable product or product developed through this contract. Licensing and marketing rights to the developed product will not be granted in the contract. Proposals regarding these rights should not be submitted in response to this Request for Proposal and will not be considered in evaluating responses. If in the future HRM elects to commercialize the developed product, the licensing and marketing rights will be negotiated separately.

2.21 Confidentiality

The selected proponent agrees not to release or in any way cause to release any confidential information that pertains to the HRM unless they have been specifically approved to do so in writing.

2.22 Added Value

HRM is interested in maximizing the value of expenditures at it relates to achieving additional value that would further benefit HRM and its operation, as well as its community of citizens and their tax based funding. As such, bidders are encouraged to consider, develop and propose added value concepts, programs, components and the like that would further enhance the proposed acquisition represented in this solicitation request. Proponents are encouraged to clearly identify “added value” additions to the RFP proposal in order that they be given proper consideration as additional scope beyond the stated requirements of their proposal.

2.23 Contractor Safety Management Policy

2.23.1 The proponent shall:

- a) Comply with all health and safety and environmental legislation in the performance of this contract and to practice the principles of proactive Due Diligence.
- b) Maintain a safe and healthy work environment during the performance of his contract.
- c) ensure compliance with the provisions of HRM Contractor Safety Management Policy as found on HRM's web site at www.halifax.ca/procurement

2.23.2 The Proponent shall

- a) Comply with all health and safety and environmental legislation and any HRM policy or procedure applied to or applicable to this contract is a condition of the contract.

- b) Permit HRM to audit or inspect my/our health and safety and environmental records during the term of the contract and upon its conclusion and co-operate fully with any such audit or inspection.

2.23.3 The Proponent shall agree:

1. that HRM may address contractor safety deficiencies in the following progressive steps:
 - a) The problem will be identified to the Proponent, (site supervisor).
 - b) The Proponent's head office will be contacted about the problem, orally and followed up in writing.
 - c) The Contract may, at the discretion of HRM, be suspended or terminated and/or payment withheld by HRM.
 - d) If required to do so by legislation, HRM will immediately report the problem to the appropriate regulatory authority
1. that depending upon the nature and/or seriousness of the deficiency HRM reserves the right to bypass any or all of the steps described in subsection 2.23.3(1)

2.23.4 The Proponent shall acknowledge they have read the HRM Contractor Safety Management Policy as found on HRM's web site at www.halifax.ca/procurement and that the proponent understands and shall undertake to adhere to the terms of this Policy and to co-operate with HRM in its efforts to ensure compliance thereunder.

3.0 PROJECT BACKGROUND AND FRAMEWORK

3.1 HRM Brand Development

3.1.1 Consultant for the development of a new brand (CAO's Office)

This RFP seeks proposals for assistance to consult and engage audiences, define and develop options and help implement and roll out an authentic, unique and inspiring new brand for the municipality, one that will represent citizen and municipal interests, and portray the Halifax region in a transformational way to both our citizens and the world.

Since it amalgamated nearly two decades ago, the municipality continues to function under and be known by its legal name, Halifax Regional Municipality (HRM). Regional Council recently directed HRM staff to explore and develop options for a new brand that will better reflect our best attributes and project the image of the municipality in a more succinct, innovative and powerful way.

The Greater Halifax Partnership (GHP) already verified the need for a more robust and modern brand based on consultations with the business, academic, non-profit and public sectors. Other

stakeholders to be consulted would include cultural and ethnic communities, as well as organizations such as Destination Halifax, universities, the Waterfront, Halifax Stanfield International Airport, Water and Port authorities, Chamber of Commerce and the Business Improvement Districts. Please see Appendix 'E' for a more extensive but not exhaustive list of stakeholders to be consulted.

Reference documents include a focus group study done in January 2013 of citizen perceptions, a telephone survey done in March 2013 of insights into local priorities, as well as additional studies by GHP, plus, related Council and committee reports. The proponent will also be expected to conduct research into global best practices for city brands, particularly places that experienced amalgamation (e.g. Toronto and New York).

A key phase will be the attribute exploration involving both public-facing and wide online facilitation, to be held in public venues as well as 24/7 on a new public engagement portal. The brand engagement should encompass a demographically representative cross-section of the municipality. The consultant will help design the portal experience based on a recently acquired online engagement platform (Sustainet – Engagement HQ) and use innovative ways to solicit feedback from the public on the values and attributes to be reflected in the brand development.

The successful proponent will work with HRM staff and GHP to help design the engagement to ensure the approach and content are innovative, comprehensive and consistent. Components of the online engagement portal would include research, interactive graphics, video, presentations, polls and other and tools.

All feedback must be documented, analyzed, summarized and consolidated into progress reports and a final presentation to Regional Council. This approach will demonstrate the essential mapping of attributes as a foundation to develop brand options, help inform senior management and Regional Council about relevant elements, and create support for a new brand.

Phases in the creation of a new brand will encompass:

1. Scope definition, project charter and creative brief, incl. engagement options for inclusion in Regional Council recommendation report
2. Development of engagement tools, content and processes
3. Engagement of citizens and stakeholders
4. Interim and summary reports of findings and proposed brand approach
5. Creation of final options and presentation to Regional Council
6. Development of brand guidelines and templates
7. Assistance with an incremental and prioritized implementation plan

These recommendations will form the basis for the development of a new brand and recommendations to Regional Council.

3.1.2 Goals of the brand development:

To reflect the essence of the Halifax region and rally citizens around a new brand for which they

helped identify its key attributes.

- To provide a platform that helps the business community raise our profile, leverage positive characteristics and compete with other jurisdictions
- To provide a system or set of guidelines based on best practices that can integrate diverse HRM entities and initiatives more coherently (thereby eliminating disparate, unconnected or separate branding efforts) and provide templates that may ultimately help recover the cost of rebranding.

HRM seeks a consultant who is familiar with current and effective public engagement processes, with added weighting for proposals identifying innovative and creative engagement approaches. In recognition of this critical element, proponents are reminded to be fully acquainted with the Council approved *HRM Community Engagement Strategy* policy.

Proposals shall be guided by the following principles and protocols:

1. Citizen participation is recognized as an asset, is valued & encouraged
2. The purpose and the process are clear to all participants
3. Everyone potentially affected by the process has an opportunity to become involved
4. Barriers to access are recognized and overcome to ensure diverse, inclusive & balanced participation
5. The process is respectful, fair, effective & transparent
6. Communication is clear, timely & effective
7. Public involvement is adequately resourced
8. Participants are informed of the outcomes
9. The public has an opportunity to provide feedback at the various stages of the process
10. Community engagement will be evaluated & improved

The HRM Community Engagement Strategy can be accessed at www.halifax.ca/CRCA/communityengagement/documents/CommunityEngagementStrategy.pdf

3.1.3 Objectives/Critical Path

Objective: To engage, develop and facilitate the delivery of a new brand for HRM

The following is an **estimated** timeline of the major milestones and critical path required for the project, and should be referred to in order to help calculate resources required and for budget development:

July 23	RFP posted
July 26	RFP information session for proponents at 2 p.m. in Halifax Hall, City Hall, 1841 Argyle St., Halifax
August 13	RFP closes
August 14-23	RFP response review
By September 24	Recommendation report to Regional Council for approval to proceed, including project charter, scope, budget and options as

	well as the chosen RFP proponent
By September 30	Planning meeting with successful proponent
Fall 2013	Pre-consultation public information begins online
	HRM-wide public, community and stakeholder engagement begins
	Public, community and stakeholder engagement concludes
December 2013	Draft proposal to HRM/GHP brand team
Early 2014	Target date for presentation to HRM Regional Council for consideration and approval
	Brand launch

3.1.4 Requirements

The successful proponent must demonstrate:

- Substantial and exceptional experience in brand creation and execution
- Effective scope definition and creative brief development
- Examples of similar and detailed timelines and work backs which are realistic and complete
- Proven experience and capabilities in delivering public sector/major issue facilitation and engagement with large groups and diverse audiences
- A deep understanding of business, ethnic and cultural communities within HRM.
- Verbal and multimedia presentation skills and experience
- A track record of innovative solutions for both local and national or international clients
- Success working with online experiences, engagement tools and websites, portals and hubs
- Consideration for existing precedents and potential marks and elements such as signage and common fonts
- Experience managing meetings and keeping agendas on-time and on-topic
- A strong understanding of HRM's business and residential demographics and communities
- An intimate understanding of some of the potential key attributes and local perceptions and aspirations, including cultural themes, history, business context and references
- An ability to meet frequently, at local sites and scouting locations, on short notice and in

person to discuss development of the brand and components

- Unique strategies and tactics to engage, roll out and launch brands that adds intrinsic value

Scope of work details are outlined in Section 5.0

The Consultant is primarily required to guide the development of a new HRM brand and conduct a creative engagement process involving the public and key stakeholders, which is ultimately to be presented to and decided upon by Regional Council.

3.1.5 Constraints

In order to meet some of the initial projected timelines presented to Regional Council, and in order that results and recommendations may be implemented in both the 2013/14 and 2014/15 budget process, the critical path of deliverable dates is sensitive and will also likely be a subjective topic discussed in the public realm along with the associated costs.

It is also important that the brand solution ultimately proposed be able to be implemented in a systematic, prioritized and incremental approach in order to be cost-effective.

3.1.6 Assumptions

- The proposed engagement process would include both public and GHP-led stakeholder consultation, including face to face and online components.
- The consultant would assume a key role in implementing public consultation and engagement in collaboration with HRM staff. The consultant must be ready and capable to work collaboratively with HRM staff and to maintain close communications over the course of the project.
- The consultant would be responsible for helping to organize events, analyzing public and stakeholder feedback and collating and developing written results and summaries of the engagement process; identifying key themes, messages, and incorporating and developing a new and encompassing brand platform.

3.2 Project Framework

The consultant will be required to help design and conduct a unique brand, including an attribute identification and engagement strategy that ensures citizens and stakeholders have a role in identifying foundational characteristics for such a brand. The next phase will focus on creating and crafting a powerful new brand proposal and describing its benefits, how it will be implemented, template examples, launch components, etc. within a presentation for Regional Council. This work will include:

- facilitating engagement formats and events with a professional team well versed in open consultation methodology and provide the supporting context and subject matter

materials;

- preparing event plan(s) that address meeting logistics, format and agenda, and resources. This planning should take into account the use of HRM facilities and logistical support through its various departments, assets and resources;
- providing input and support to ensure integrated and consistent messaging in HRM promotion and communication efforts related to rebranding;
- developing a brand roadmap and framework;
- co-developing and placing any related promotional advertising with HRM Corporate Communications. Any non-typical media channels proposed should be identified in the proposal separately or discussed at the kickoff meeting. Any specific video would be produced by HRM, with proponent input, or identified as a separate cost with justification. Web components would either be handled by HRM as part of the engagement portal or within the HRM website. Any specific consultation microsite development would have to be identified separately and estimated in the proposal, and discussed and agreed to at the kickoff meeting (and adhere to HRM privacy policies, i.e. no foreign hosting or access – see item 2.16 *Public Information/Proprietary Information* and *Appendix C*, item 24).

Any other materials which might be considered out of the typical scope of normal public consultation, such as interactive components or unique social media, should either be identified separately in the proposal or discussed as options in early planning meetings and mutually agreed to in advance.

- integrating with and contributing to a new online engagement portal/hub/tool or microsite, and into existing social media channels

4.0 PROJECT OBJECTIVE

To conduct a successful rebranding proposal using exceptional creativity and innovative public consultation, resulting in a proposal for a transformational new brand approved and supported by Regional Council. The proposal will facilitate a comprehensive city brand system and a more powerful international brand persona. An immediate requirement would be the completion of a project charter, to be completed by the proponent, and approved and signed by HRM.

5.0 DETAILED SCOPE OF CONSULTING SERVICES

The Proponent will be required to develop, deliver and complete the following scope of work:

Key Project Deliverables:

Solicit and capture input from the local community, general public and stakeholders and weave into an exceptional brand platform proposal, including (but not limited to) the following tasks:

1. Conduct research into best practices and examples at other municipalities.
2. Develop an engagement program delivery and logistics plan that can achieve the

- engagement objectives within the project timeline.
3. Design, coordinate and deliver at least two (2) public consultation sessions focused on identifying key attributes and gaining wide public feedback (options on the cost for consultation approaches and sessions should also be included in the submission).
 4. In conjunction with HRM staff, develop engagement education materials, presentations and marketing collateral based on insightful brand strategy.
 5. Document and consolidate results from all public/stakeholder consultation sessions, surveys and other proposed initiatives into report(s) and draft for review of the engagement process.
 6. Draft/co-author key messages and FAQs.
 7. Propose social media or other high value tactics.
 8. Integrate activities into a new online engagement portal/hub/tool or microsite that engages the public.
 9. Meet with the HRM project leads on a regular planned basis prior to, during and after the consultation sessions, as required, to develop, execute and finalize the presentation and to review ongoing work and results, and to coordinate team tasks and strategies to carry out concurrent HRM corporate engagement activities.
 10. Assist HRM staff in drafting any possible surveys or polls and make recommendations on the most effective qualitative and/or quantitative method(s) or approaches to obtain the desired feedback within the constrained timelines for this project. It is anticipated that formal scientifically-based polling would be separately commissioned by HRM and not included in the cost estimate for the Community Engagement program. However, the proponent is welcome to cost this option as a separate line item in the project budget.
 11. Create a brand presentation and that can form the core of a future brand standards guidelines document/site that acts as a central resource for a new HRM brand.

5.1 Project Management

The proponent shall designate in their proposal, a project manager (PM) to liaise and coordinate with the HRM project lead.

The PM shall communicate to HRM through an agreed schedule of meetings and reports (likely on a weekly basis or even more frequently during active consultation periods) agreed to in the project charter. The work progress would be measured against a defined budget and work schedule as detailed in the proposal and supported by typical PM tools such as the Project Charter, Gantt Charts, written and verbal narratives and insights, etc. Any deviations from the charter or agreed process would be discussed and given to the HRM contacts in writing for approval. The proponent is to develop a plan and liaise with regulatory bodies, utilities, stakeholder groups, other levels of government, members of the community, as required to ensure a comprehensive understanding of the issues is included in the development of the consultation and engagement program.

The proponent is to provide copies to HRM of all correspondence related to the project including agreements reached on behalf of HRM.

The Proponent shall be prepared to meet the timings and deliverables outlined earlier or give full notice and rationale why this is not achievable.

5.2 Community and Stakeholder Engagement Strategy

The engagement component of this project is integral to the development of a new HRM brand. A preliminary list of stakeholders is attached in Appendix 'G'.

For all projects with a Community Engagement (CE) component, the Proponent must comply with the intent and recommendations of HRM's Approved Community Engagement Strategy. The approved strategy can be accessed on HRM Website at: <http://www.halifax.ca/crca/documents/CommunityEngagementStrategyDec92008.pdf>

5.3 Reporting and Deliverables

Deliverables listed under 5.0 "Detailed Scope of Consulting Services".

Electronic copies of all information (reports, presentations, drawings, and calculations; e.g., spreadsheets, computer model data files, etc.) shall be provided to HRM on a USB flash drive. All reports are to be provided electronically, each as a single PDF file and all reports shall be provided in MS Word format and data shall be provided in Excel format.

In addition to electronic versions, forty (40) copies of the bound, full colour final report shall be provided in printed/hardcopy format.

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

Headline: Project Drive
Title: **Halifax Regional Municipality Rebranding Project**
RFP Ref: RFP P13-083
Date:
Proponent:

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

Cost estimates are required and are to exclude HST.

6.0 PROPOSAL SUBMISSION

The submission of a proposal on this service will be considered as a representation that the proponent has carefully investigated all conditions which may affect or may, at some future date, affect the performance of the services covered by the proposal, the entire area to be services as described in the attached specifications and other contract documents and that the proponent is fully informed concerning the conditions to be encountered,

quality and quantity of work to be performed and materials to be furnished; also, that the proponent is familiar with all Federal and Provincial laws, all codes and ordinances of HRM which in any way affects the prosecution of the work or persons engaged or employed in the work.

In responding to this proposal, each proponent shall, include, as a minimum, a Technical Proposal and a Cost Proposal. The proposal is not complete unless it contains a Technical Proposal which addresses the requirements described herein, and a separate Cost Proposal that details all costs for the proposed services. Both the Technical Proposal, which shall be identified as envelope #1, and the separate Cost Proposal, which shall be identified as envelope #2, shall be submitted simultaneously. Both Technical and Cost Proposal must be signed by an authorized representative of the firm submitting.

Sealed Proposals will be received by HRM Procurement Section, Suite 103, 1st Floor, 40 Alderney Dr. (Alderney Gate), Dartmouth Nova Scotia, B2Y 2N5

6.1 Submission Requirements

The Proposal shall include the following as a minimum; failure to do so may be cause for rejection of the proposal:

6.1.1 General Information

6.1.1.1 Using the form identified in this document as Appendix B – General Information, the proponent shall provide the name of the firm, Office address, telephone number, email address, and facsimile number and Business Registration Profile.

Note: The Laws of the Province of Nova Scotia require that all businesses operating in Nova Scotia to register with the Registry of Joint Stock Companies except:

- New Brunswick corporations and NB partnerships/business names **registered** in New Brunswick
- Individuals or partners using only their personal names without a descriptive element or attachment such as 'and Associates'
- Partnerships whose sole purpose is farming or fishing

The status of a proponent's business registration does not preclude the submission of a proposal. 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 (i.e.: status is 'active'). However, this legal requirement must be addressed at time of award.

6.1.1.2 Proponents shall provide a one (1) to two (2) page executive summary of their proposal

6.1.1.3 Proponents shall provide a one (1) to two (2) page corporate

resume detailing the proponent firm/partnership's credentials and experience specific to the scope of work detailed in the RFP

6.1.1.4 Proponents shall provide an organizational chart detailing the structure of the proponent team specific to the scope of work, by position.

6.1.2 Team Composition and Experience

6.1.2.1 Proponents shall provide, in detail, their credentials related to the scope of work and any information which documents successful and reliable experience in past contracts, especially those contracts related to the requirements of this Request for Proposal.

6.1.2.2 A one (1) page resume detailing educational qualifications and previous work assignments related to this Request for Proposal for each person who will perform the services required. These credentials may be subject to verification.

The proponent shall provide a matrix indicating which of the previous work assignments each individual has worked on in order to assess the team's experience in working together.

In the event there would be a change in the persons named and assigned to perform the services under the contract, the proponent shall be required to submit, for approval to HRM, the credentials and resumes of the persons the proponent proposes to perform the services under the contract.

6.1.2.3 Proponents shall provide a list of three (3) applicable client contacts who have contracted for services offered by the proponent which is considered identical or similar to the requirements of this Request for Proposal. The list should include the following information:

1. Company Name and Address
2. Contracting Officer and Telephone Number
3. Technical Representative and Telephone Number, and
4. A brief, written description of the specific services provided including the year, proponent contract value and final proponent contract value.

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

6.1.3 Understanding of HRM Needs and Technical Solution

6.1.3.1 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. Provide a clear description of approach, methods, techniques, and task to be performed in carrying out the objectives, terms of reference, scope of work, undertakings and deliverables as contained in this RFP.

6.1.3.2 Proponents shall provide a Gantt chart indicating significant milestones and the schedule for each scope of work activity, estimated start time and end date for required tasks. The proponent's proposal shall also indicate the number and frequency of the anticipated meetings for the review process. Indicate on the schedule the critical path. For the purposes of constructing a schedule the proponent shall consider the following:

July 22	RFP posted
July 26	RFP information session for proponents at 2 p.m. in Halifax Hall, City Hall, 1841 Argyle St. Halifax
August 13	RFP closes
August 14-23	RFP response review
By September 24	Recommendation report to Regional Council for approval to proceed, including project charter, scope, budget and options as well as the chosen RFP proponent
By September 30	Planning meeting with successful proponent
Fall 2013	Pre-consultation public information begins online HRM-wide public, community and stakeholder engagement begins
	Public, community and stakeholder engagement concludes
December 2013	Draft proposal to HRM/GHP brand team
Early 2014	Target date for presentation to HRM Regional Council for consideration and approval
	Brand launch

The proponent shall use standard calendar dates when presenting the schedule. Weekends and evenings shall be included in project session costing as identified in the project plan.

6.1.4 Project Management Methodology

An organizational chart clearly identifying team roles and primary contact will be provided (in the case of multi-disciplinary Joint Ventures, the lead firm will be identified.) A Work Breakdown Structure indicating each team member's responsibility and contribution in both days and as a percentage of the total work should be included per the requirements of Section 3.

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

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

6.1.5 Sustainability

HRM is committed to purchasing sustainable goods, services, and construction.

To aid the evaluation committee in better understanding the sustainable attributes for this purchase the proponent should prepare the following:

- A brief statement, to maximum of (2) pages, that outlines the proponent's commitment to the sustainable operations of HRM
- Given the requirements in this RFP, describe how the service that you are proposing will be provided in a sustainable manner (e.g. considering greenhouse gas reduction, waste reduction, toxicity reduction, worker health and safety, and local economic development).
- If the requirement includes a good as part of the RFP, also include the following question:

Considering the manufacture, uses, and end-of-life disposal of the product proposed, describe the sustainable attributes of the product (e.g. considering greenhouse gas reduction, waste reduction, toxicity reduction, worker health and safety).

6.1.6 Other

Additional brief facts concerning your organization which you feel are critical in evaluating your proposal.

6.1.7 Contractor Safety Management Policy

All Proposals containing a construction or building component must include a completed Contractor Safety Questionnaire.

6.2 Cost Proposal

6.2.1 The cost proposal shall be submitted at the same time as the technical proposal as a separate document in a separate sealed envelope

6.2.2 The Cost Proposal shall include a single page duly signed stating the proponent's firm fixed total price for this service as outlined in the Request for Proposal.

6.2.3 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 (Fixed firm). The cost proposal is to be a separate document.

- 6.2.4 The total cost shall represent the maximum payment for the project. Price data should include fixed price, estimated hours of work by key staff and individual hourly cost for staff. Include and identify expenses and HST separately. Price may not be the determining factor for award. HRM may negotiate a final offer with the selected proponent.

6.3 Document Size Restrictions

Elaborate or voluminous examples are not desired. Your proposal should not be more than 25 pages maximum. Speculative work should not be included. Digital submissions must not exceed 10Mb.

6.4 Number of Proposals to be Submitted

Six (6) copies, One (1) unbound and duly signed and four (4) bound and one (1) in digital format on flash drive of each proposal both technical and price components are to be submitted. Technical and price components must be submitted in separate envelopes and as separate digital files on separated drives. In the interest of sustainability, please do not bind your proposal in a 3-ring binder. A corner stapled or coil document shall be considered as bound.

7.0 METHOD OF AWARD

The evaluation process will be carried out by an evaluating committee who will establish the ranking of all the consultants and produce a short list. The short-listed consultants may be invited to make a brief presentation. The results of the above process will be brought to the appropriate staffing level with a recommendation from the evaluating committee to award.

7.1 Evaluation Process

Each Proposal will be evaluated using the following process:

- Stage 1: Verify each bid's compliance to the Mandatory Criteria identified below, and disqualify any bids that fail to meet these.
- Stage 2: For bids that pass the Mandatory Criteria, evaluate and score each one, using the Desirable Criteria and weights.

Stage 1 – Mandatory Criteria

The proposal must meet all of 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.

1. The proposal must clearly demonstrate the proponent's experience and ability to fulfill the service requirements identified.
2. All Cost Proposals must be submitted in Canadian dollars (CDN) exclusive of all taxes.
3. Demonstrated understanding of the linkages to the concurrent system review option outputs that will require public and stakeholder input as well as the challenge of project deadline by identification of innovative engagement techniques/approaches as well as appropriate number and expertise of staff to undertake workshop and focus group work, facilitation, analysis and report writing as required in the scope of work.

Stage 2 – Proposal Evaluation Criteria

All proposals which pass Stage 1 – Mandatory Criteria will be evaluated and ranked against the weighted **Proposal Evaluation Criteria** listed in Appendix A - Proposal Evaluation Criteria. Proposers are reminded that the proposal is the main document used in the evaluation and that the Proposer shall insure all information required to make the decision is included. Proposals not achieving a minimum of 75% of the total available technical points will no longer be considered and the Cost Proposal will be returned unopened.

To assist in the evaluation of the Responses, the Evaluation Committee may, but is not required to:

- Contact the proponent's clients/customers relevant to the proposal with any or all of the client contacts cited in a response to verify any and all information regarding a proponent and rely on and consider any relevant information from such cited references in the evaluation of responses.
- Conduct any background investigations that it considers necessary in the course of the evaluation process and consider any relevant information resulting in the evaluation of Responses;

The evaluation committee will only seek clarification from a proponent if the requested information is ambiguous or missing and if such clarification does not offer the proponent the opportunity to improve the competitive position of its response. To the extent possible, requests made by the Evaluation Team will be sent from the email addresses of the RFP Contacts.

HRM reserves the right to deduct points from the Technical Proposal evaluation per Appx. A, Proposal Evaluation Criteria based on assessment of risk as follows:

- Low risk – exceptions or omissions to RFP terms and conditions and/or format indicate no risk or low risk to successful completion of project: (-0) to (-5) points
- Medium risk – exceptions or omissions to RFP terms and conditions and/or format indicate a risk to successful completion of project that can be mitigated using HRM resources: (-5) to (-25) points
- High risk – exceptions or omissions to RFP terms and conditions and/or format indicate a risk to successful completion of project that can be mitigated but will require significant HRM resources: (-26) to (-50) points
- Unacceptable risk – exceptions or omissions to RFP terms and conditions and/or format indicate a high probability of project failure: (-50) to (-100) points

7.2 Cost Proposal Evaluation

Unless otherwise stated in this document or its addenda, the proposal with the lowest cost shall receive the maximum points allowed. All other proposals shall receive a cost score based on their cost relationship to the lowest. The points for the financial evaluation will be allocated as follows. The total cost of each technically responsive bid will be calculated as shown in the Evaluation of Price. The lowest total cost will achieve maximum available points. All other proposals will be prorated using the lowest cost bid and the following formula:

Max Available Pts. – [Max Avail. 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 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:

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

The value of the contract for this project shall be inclusive of applicable HST.

8.0 AWARD OF PROPOSALS

- 8.1 HRM reserves the right to modify the terms, or cancel, or reissue the Request for Proposals at any time at its sole discretion.
- 8.2 This Request for Proposal should not be construed as a contract to purchase goods

or services. Although proposals will be assessed in light of the evaluation criteria, HRM is not bound to accept the lowest priced or highest scoring proposal or any proposal. HRM reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever, in its opinion, best serves the interests of HRM.

- 8.3 Subsequent to the submissions of proposals, interviews may be conducted with some of the proponents, but there will be no obligation to receive further information, whether written or oral from any proponent.
- 8.4 HRM will not be obligated in any manner to any proponent until a written contract has been duly executed. Any damages arising out of a breach by HRM, including damages for any implied duty at law, are limited to the actual costs of preparing the proposal. Neither acceptance of a proposal, nor execution of a contract, will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any statute, regulation or by-law.
- 8.5 HRM offers debriefing to unsuccessful proponents. An unsuccessful proponent must request a debriefing in writing within 10 (ten) days from the date of posting the award on the Nova Scotia Public Tenders website. Upon timely receipt, the HRM will contact the interested proponent to arrange a date, time and place for the debrief, which normally will be conducted in person.

9.0 POST COMPLETION REVIEW

HRM will conduct a post-completion evaluation/review of all performance related issues. The results of this review will be communicated to the proponent and will be retained by HRM for future reference.

**APPENDIX A
 EVALUATION CRITERIA**

Criteria	Summary (considerations may include but are not limited to the following)	Score
Communication Skills	<ul style="list-style-type: none"> • Clarity and readability of written proposal 	5
Demonstrated examples	<ul style="list-style-type: none"> • Sector specific experience of the Proponent Firm • Experience of individual team members with projects of similar scope and size • Team members' appropriate skills and education • Demonstrated history of proposed team in successfully completing projects of a similar nature on time and on budget • Balance of level of effort vs. team roles (project mgmt., technical, etc..) 	15
Understanding of HRM needs	<ul style="list-style-type: none"> • Understanding of the requirements of the scope of work and HRM organizational structure • Acceptable proposed schedule and work plan • Value added propositions and recommendations • Attention to relevant challenges that the committee has not considered 	15
Technical Solution	<ul style="list-style-type: none"> • Solution addresses all technical aspects of the project as identified in the RFP • Solution draws on proven methodology • Solution is flexible and scalable • Solution is cost and time effective 	20
Innovation Solution	<ul style="list-style-type: none"> • Proposal includes innovative ideas and methods on both engagement sessions and materials 	10
Project Management Methodology	<ul style="list-style-type: none"> • Management structure within Proponents organization/project team • Proposed communication methods between proponent team and HRM • Quality Assurance standards and practices 	5
Subtotal (Technical Proposal)		
Cost		30
Administrative and Legal Requirements	<ul style="list-style-type: none"> • Based on level of risk identified in Stage 2 technical evaluation. 	0 BUT POINTS MAY BE DEDUCTED
		100

**APPENDIX B:
PROPONENT'S GENERAL INFORMATION**

PROPONENT NAME: _____

ADDRESS: _____

CONTACT NAME: _____

EMAIL ADDRESS: _____

TELEPHONE: _____ **FAX #:** _____

BUSINESS PROFILE (PLEASE CHECK THE APPROPRIATE BOX)

I AM A BUSINESS REGISTERED IN NOVA SCOTIA OR NEW BRUNSWICK. MY REGISTRY OF JOINT STOCKS COMPANIES (NS) OR CORPORATE AFFAIRS REGISTRY (NB) PROFILE IS ATTACHED

I AM A BUSINESS THAT OPERATES IN NOVA SCOTIA OR NEW BRUNSWICK BUT IS DOES NOT HOLD VALID AND UP TO DATE REGISTRATION IN EITHER OF THESE JURISDICTIONS. MY PLAN TO OBTAIN REGISTRATION SHOULD I BE AWARDED A CONTRACT AS A RESULT OF THIS SOLICITATION IS ATTACHED

THIS PROPOSAL HAS BEEN SUBMITTED IN THE PROPONENT'S PERSONAL NAME. THEREFORE A REGISTRY OF JOINT STOCKS COMPANIES (NS) OR CORPORATE AFFAIRS REGISTRY (NB) PROFILE HAS NOT BEEN SUBMITTED

THIS PROPOSAL HAS BEEN SUBMITTED BY A PROPONENT WHICH IS A REGISTERED BUSINESS IN ANOTHER JURISDICTION AND THE WORK WILL NOT BE PERFORMED IN NOVA SCOTIA. THEREFORE A REGISTRY OF JOINT STOCKS COMPANIES (NS) OR CORPORATE AFFAIRS REGISTRY (NB) PROFILE HAS NOT BEEN SUBMITTED

PROPONENT SIGNATURE

DATE

PRINTED NAME AND TITLE

**APPENDIX C – VENDOR EVALUATION
 Consulting Related Projects**

Vendor Name:	Project Manager:
Project Name:	Tender / RFP NO.
Project Type:	Date:

General Notes

Core Consulting Questions	Yes / No N/A*	Rating (0-5)	Comments
Contract deliverables provided on time?			
Contract deliverables met agreed quality standard?			
Compliance with all contract provisions?			

Contract deliverables met agreed budget?			
Did the Consultant minimize change orders and maintain awarded cost?			
Was the Consultant accessible and communicative with staff?			
Did the Consultant allocate the correct # of resources to the Project?			
If applicable, did the consultant comply with the intent of HRM's Public Engagement Strategy?			

Core Consulting Questions	Yes / No N/A*	Rating (0-5)	Comments
Did the implementation plans and designs adequately consider estimated Construction budget?			
Did Plans, Drawings and Specifications meet project requirements?			
Was the final deliverable technically accurate, easily understood and without omissions?			
Was billing accurate and include supporting documentation?			

APPENDIX D

CONTRACTOR HEALTH & SAFETY QUESTIONNAIRE

Contractors wishing to submit proposals to HRM must complete this questionnaire and submit it to HRM Procurement with their bid information

GENERAL INFORMATION:

Company Name: _____

Company Address: _____

Telephone Number: _____

INSURANCE/WORKERS' COMPENSATION COVERAGE:

Is your company covered by general liability insurance, automotive insurance, umbrella policies, etc., that would cover the cost of damages to, and incidents involving third parties? Yes No

Is your company in good standing with the Workers' Compensation Board for the Province of Nova Scotia? Yes No

If no, please explain _____

SAFETY PERFORMANCE:

Does your company have any non compliance or outstanding issues with The Nova Scotia Department of Environment and Labour, such as stop work orders, pending charges/prosecutions, or recent (within the last year) convictions or fines? Yes No

If yes, please attach a note explaining the details, including current status or resolution.

SAFETY PROGRAM:

Does your company have a written health and safety policy signed by management? Yes No

Does your company have written safety policies, procedures, and safe work practices applicable to the scope of work to be performed, including clearly defined safety responsibilities for managers, supervisors and workers? Yes No

How do you communicate your safety policies and procedures?

How often do managers/executive officers visit the work site? _____

Please explain how you conduct on site inspections, including how often they are conducted, what they cover and who conducts them?

Does your company have a risk assessment procedure? Yes No

Does your company have a procedure in place for investigating incidents, accidents and near misses? Yes No

The Contractor shall attach a list and contact information of all supervisors you will be using on site, as well as any safety coordinator or persons responsible for job site safety.

Do you provide on the job training to all employees? Yes No

Please indicate how you inform your workers, other workers or persons at or near the workplace of any workplace hazards to which they may be exposed.

Do you have a disciplinary policy in place for anyone committing health and safety violations? **Please describe:** Yes No

Do you have a Joint Occupational Health and Safety Committee or Representative? Yes No

Do you have a preventative maintenance program for tools and machinery? Yes No

Do you have a health and safety policy in place for incorporating sub
contractors into the workplace ?

Yes No

Please provide any other information relating to other programs or activities that you believe
demonstrates your company conducts their projects safely and in accordance with all health and
safety requirements.

**NOTE: PLEASE BE ADVISED THAT DURING THE TENDERING PROCESS OR
AT ANYTIME DURING THE CONTRACTED WORK, HRM MAY
REQUEST COPIES OF POLICIES, PROCEDURES, RECORDS OR
DOCUMENTATION OF PROOF FOR ANY QUESTIONS ANSWERED
ON THIS QUESTIONNAIRE.**

**DO YOU AGREE TO PROVIDE THIS INFORMATION
IF REQUESTED ?**

Yes No

Signature

Date

Position / Title

Appendix E: Stakeholders to be Consulted

Preliminary

Stakeholders to be consulted or informed during brand development should include the following groups. A more extensive list will be developed during scope development.

Business stakeholders to be consulted (GHP is the lead)

Halifax International Airport

Destination Halifax

Halifax Chamber of Commerce

Halifax Water

Port of Halifax

Waterfront Development

... more to come from GHP

(Business Improvement Districts to be consulted in partnership with HRM Government Relations)

Civic & Government stakeholders to be consulted

Province of Nova Scotia – Departments: Communities, Culture and Heritage; Economic and Rural Development and Tourism; Intergovernmental Affairs

Halifax Regional Police and RCMP

Halifax Regional Library

Our HRM Alliance

Arts & Culture stakeholders to be consulted

Greater Halifax Arts Coalition

Arts Nova Scotia

Art Gallery of Nova Scotia

Symphony Nova Scotia

Cutural Federations of Nova Scotia

Creative Nova Scotia Leadership Council

Film and Creative Industries Nova Scotia

Music Nova Scotia

NSCAD

NSCC

Centre for Arts & Technology

Fusion Halifax

Neptune Theatre

Association of Nova Scotia Museums

Heritage Trust of Nova Scotia

The Kyhber Arts Society

4Cs Foundation

Eye Level Gallery

Multicultural stakeholders to be consulted

Multicultural Association

KMK (Mi'kmaq Rights Initiative)

Africville Geneological Society

Black Cultural Centre for NS

Federation acadienne de la Nouvelle-Ecosse

Pier 21