

City of Coquitlam

REQUEST FOR PROPOSALS RFP No. 14-11-01

Consulting Services for **Arts, Culture & Heritage Strategic Plan**

Proposals will be received on or before 2:00 pm local time Tuesday, December 9, 2014

(Closing date and time)

Obtaining RFP Documents

RFP Documents are available for downloading from the City of Coquitlam's website: www.coquitlam.ca/BidOpportunities

Printing of RFP documents and drawings is the sole responsibility of the Proponents.

Addenda

Proponents are required to check the City's website for any updated information and addenda before the closing date at the City website: www.coquitlam.ca/BidOpportunities

Proposals Submissions

The City reserves the right to accept or reject any or all Proposals or accept a Proposal deemed to be in the best interest of the City.

The City will not be responsible for any costs incurred by Proponents in preparing a response.

D. Trudeau Purchasing Manager

Issue Date: November 18, 2014

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DEFINITIONS

"City" "Owner" means City of Coquitlam.

"Agreement" "Contract" means the contract for services or City Purchase Order (PO) issued to formalize the accepted Proposal.

"Consultant" means the person(s), firm(s), or corporation(s) appointed by the City to carry out all duties, obligations, work and services described in the Request for Proposal and all associated documentation, which may also include mutually agreed revisions subsequent to the submission of a Proposal. Both "Consultant" and "Proponent" are complementary in terms of duties, obligations and responsibilities at the Request for Proposal stage, through evaluation process, execution and delivery of the services.

"Project Manager" means City staff member responsible for coordination of the Services with the City being provided by the Consultant.

"Proponent" means responder to this Request for Proposal.

"Proposal" means the submission by the Proponent.

"RFP" "Request for Proposals" shall mean and include the complete set of documents, specifications, drawings and addenda incorporated herein, and included in this Request for Proposal.

"Services" means and includes the provision by the successful Proponent of all services, work, duties and expectations as further described in this RFP. This will also mean the whole of the work, tools, materials, labour, equipment, travel, and all that is required to be completed and furnished by the Consultant.

The City of Coquitlam ("City") is issuing a Request for Proposals (RFP) to select a professional, qualified and experienced consulting firm to prepare an **Arts, Culture & Heritage Strategic Plan** (the "Services") which will provide a comprehensive strategic framework for the effective management, organization, coordination and prioritization of Coquitlam's Arts, Culture & Heritage assets, programming and service for the next 15 years.

1.0 PROJECT INTRODUCTION AND PURPOSE

1.1 Introduction

Coquitlam has a multifaceted cultural context which warrants additional planning and coordination to define and understand its unique cultural identity and how the arts, culture and heritage sector contributes to how citizens connect to their community socially, culturally, spiritually, and emotionally. A significant component of Coquitlam's cultural identity is in its unique natural assets, the population's cultural diversity and its strong sport and recreation foundation.

Arts, culture and community heritage programs and services are offered through a variety of City delivered programs, arms-length service providers and community partners, loosely coordinated and supported through the City's Community Recreation division of the Parks, Recreation and Culture (PRC) department. These programs and services also have significant value for other City departments such as Economic Development, Tourism, Strategic Initiatives, City Archives and Community Planning and Development.

The Draft 2014 Parks Recreation and Culture Master Plan highlights the critical need for a strategic framework to organize, coordinate, and prioritize the development of Coquitlam's Arts, Culture & Heritage programming, assets and services for the next 15 years. The preparation of the Arts, Culture & Heritage Strategic Plan was identified as a priority in the 2014 Business Plan.

1.2 Planning Context

Coquitlam is currently the fastest growing municipality in Metro Vancouver and has an existing population of 138,000¹. The City's population is projected to increase by over 87,000 people in the next 30 years, potentially reaching a population of over 225,000 by 2046.

¹ 2013 Annual Report. City of Coquitlam, BC

Arts, culture and community heritage programs and services play an important role in the community's social, emotional, and economic wellbeing. Activities in this incredibly diverse service area include public festivals, events and celebrations, adult learning, visual and performing arts, public art, cultural expression, community heritage exhibits and museums, and many others. Although not easily defined, such endeavours form the essence of how a community remembers and celebrates its past, expresses itself through diverse mediums, and how its citizens connect to their community, socially, culturally, spiritually, and emotionally.

Today, the City of Coquitlam delivers a broad range of such services through direct delivery, third party provision by partner societies and non-profit providers, or via programming and other service offerings. The City provides facilities and annual operating funding for the delivery of services and programs by several key service partners in arts, culture and heritage, including Evergreen Cultural Society, Place Des Arts, Place Maillardville, Coquitlam Heritage Society, and the Coquitlam Public Library. Other areas of service, such as public art, events and festivals, and cultural programming and events, are supported through partial funding grants, or other City actions.

Despite the City's strong history and support in several areas of service in arts and culture, a single overarching plan to define and coordinate fully all arts, culture and community heritage goals, initiatives and priorities, has never been developed. This has impacted the City's ability to coordinate and enhance services across its cultural partnerships, and weakened the ability for arts and culture services to compete equally for City financing against other community priorities. The lack of a plan presents a clear impediment to the efficient and effective development of arts, cultural assets, services and programs in the long-term. Most recently, the adoption of the 2010 Cultural Services Strategic Plan took some initial steps towards defining the Community's cultural aspirations, but a much more focused and comprehensive strategic plan is required in this area which is expected to grow in need and importance as the City continues to develop and the population increases.

1.3 Objective

This strategic plan will build on the broader, conceptual planning framework being developed in the Parks, Recreation and Culture Master Plan, but will provide more detailed definition to arts, heritage and cultural services, which has traditionally lacked the strategic planning undertaken in other service areas, such as sports and recreation. The Plan will, for the first time, enable Coquitlam to define its arts, cultural and heritage aspirations and priorities,

and develop detailed long-term service objectives in Arts, Culture and Heritage. The completed Arts, Culture & Heritage Strategic Plan will thus form a key piece of the final Parks, Recreation and Culture Master Plan and Implementation Strategy, currently underway with completion scheduled for late 2015.

2.0 SCOPE OF SERVICES

The Scope of Services includes, but is not limited to, the following:

- a) Evaluate Coquitlam's cultural assets and programs in all City facilities and identify the direct and indirect benefits of cultural services to all aspects of the City's development, including the impacts on economic and community development;
- b) Examine all arts, culture and heritage programs and services funded or otherwise supported by the City to assess whether services are aligned and coordinated;
- c) Examine all arts, culture and heritage programs and services provided by private or other organizations (e.g. schools) to assess what gaps in demand these are filling;
- d) Assess emerging trends and future considerations related to the delivery of arts, culture and heritage programs to provide the context for any service delivery options which will support changing demographics, societal expectations, industry trends and best practices;
- e) Review arts, culture and heritage best practices within a Canadian and global context;
- f) Perform a comparative analysis of municipal activities in the Metro Vancouver region in the arts, culture and heritage, and consideration related to supply, demand, opportunities and constraints analysis within the Tri-Cities area, and beyond, if required;
- g) Include a public input and consultation process involving key Council Committees, stakeholder groups and the general public to identify strengths, weaknesses, opportunities, and threats and to assist in development of community priorities for arts, culture and heritage;
- h) Review existing City studies, policies and plans, is required, including but not limited to City of Coquitlam Corporate Strategic Plan (2012-2015);OCP and other Community Plans; City of Coquitlam Cultural Services Strategic Plan 2010-

2020 (2010); Public Art Policy and Program (2011); Celebrate Coquitlam Strategy (2011); Economic Action Plan (2009) and Coquitlam Tourism Blueprint (2010); Allocation Policy (Fees and Charges Bylaw, 2013); Artificial Turf Conditions of Use Policy (2008); and Draft PRC Master Plan (2014) as updated.

3.0 PROJECT DELIVERABLES

The consultant will be required to lead all aspects of the project, including reporting at key milestones, timely communications with City staff, and development and maintenance of all documentation (i.e. notes, minutes, presentations) from internal and external meetings. In addition to the process of acquiring the input listed in Section 2.0 Scope of Services and presenting findings at key milestones in this process, the deliverables will include, at a minimum, the following:

- Periodic update reports on data gathering and analysis, public consultation results, overall findings, and project status;
- A "workshop" with City Council to review the draft plan, and obtain Council feedback on any significant opportunities, challenges, issues, and long-term asset and facility priorities and funding;
- A mid-point, high-level draft document with general strategies, directions, priorities and findings, suitable for compilation as a draft public report;
- An implementation strategy including short, medium and long term goals in arts, culture and community heritage with updated, high level cost estimates and funding strategies that address capital investment and reinvestment over the next 15 years, to be fully coordinated with the Parks, Recreation and Culture Master Plan;
- A final written report suitable for Council presentation, comprising a concise, cohesive, and graphically rich strategic plan that will serve the City to guide all aspects of arts, culture and community heritage service to 2030. It will include the following key elements:
 - Within the context of the community's existing and emerging cultural identify, develop a vision for Coquitlam's Arts, Culture and Heritage service areas, including a defined mandate, role and responsibilities for the City;
 - An updated cultural map that identifies arts, culture and heritage assets;
 - ➤ Identification of potential partnership and service delivery model considerations in relation to arts, culture and heritage programs and services;

- Recommendation of a leadership framework to facilitate the coordination of Coquitlam's arts, culture and heritage sector activities, with partners such as individuals, community groups, agencies, not for profit organizations, and other government agencies involved in arts and culture;
- Identification of ways to maximize current City facility use and recommend a plan for future facility and infrastructure requirements to complete the PRC Master Plan;
- Identification of potential cross-departmental, inter-municipal, and regional public and private partnerships to enhance the delivery of arts, culture and heritage services;
- A review and confirmation of current governance and funding model with third party service providers (eg. Evergreen Cultural Centre, Place des Arts, Coquitlam Public Library, Place Maillardville, Coquitlam Heritage Society, etc.) to ensure the optimal delivery of arts, culture and community heritage service at the municipal level;
- Recommendation for the allocation of municipal resources towards arts, culture and heritage programs and services based on any current or future "gaps" in the provision of these services;
- In conjunction with the overall PRC Master Plan Implementation Strategy, the provision of short, medium and long-term deliverables along with potential costs and recommended funding strategies that could address capital investment and reinvestment over the next 10 to 15 years;
- And, a final presentation to Council to articulate key findings of the final report.

All deliverables shall be provided both as an electronic PDF format and, upon request, in a native (editable) format, as required.

4.0 PROJECT ORGANIZATION AND MANAGEMENT

The consultant will work with Coquitlam Parks, Recreation and Culture staff and meet regularly with a Working Group and occasionally with the Arts & Culture Council Advisory Committee.

The City will determine a Project Manager for the Arts, Culture & Heritage Strategic Plan. The Project Manager will solicit feedback from key staff at each phase of project development and may involve a small group of additional staff in meetings with the *Consultant*. It is intended that the *Consultant* work collaboratively with the Project Manager and other City staff, as required, throughout the process.

The *Consultant* will lead and otherwise be responsible for all elements of the Services, including reporting at key milestones, timely communications with the City's Project Manager on emerging project issues, and maintaining complete documentation (i.e. minutes, presentations) from internal and external meetings.

5.0 SCHEDULE

The preliminary schedule, milestones of the project, and associated deliverables are as follows:

Potential Dates	Task
November 18, 2014	Issue RFP
December 9, 2014	Closing Date for Proposals
January 8, 2015	Consultant Selection
January 15, 2015	Start-Up Meeting
January – March 2015	Liaise with cultural groups, and complete cultural mapping, best practice review and data analysis
March - April 2015	Consultation and stakeholder workshops
April-May 2015	Analyze input and compile Draft Plan
June 2015	Council Workshop
June – July 2015	Complete Draft Plan
July or September	Report to Council
September - October 2015	Public Consultation on Draft Plan
November – December 2015	Incorporate feedback and compile Final Plan
December - February 2016	Final report to Council

6.0 BUDGET

Budget information will not be provided.

7.0 INSTRUCTIONS TO PROPONENTS

7.1 Cost of Proposal

The City will not assume any responsibility or liability for any costs incurred by the Proponent in the preparation of a Proposal.

7.2 No Claim

Except as expressly and specifically permitted in this RFP, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in this RFP including accepting a non-compliant bid, and by submitting a Proposal, each Proponent shall be deemed to have agreed that it has no claim.

No contractual, tort, or other legal obligations are created or imposed on the City, or any other individual, officer, or employee of the City with respect to the RFP documentation or by submission or consideration by the City of any Proposal.

7.3 Acceptance of Proposal

The City reserves the right to waive formalities in, accept or reject any or all Proposals, or accept the proposal deemed most favourable in the interests of the City. The City is under no obligation to proceed with the RFP and, should it decide to abandon the same, it may, at any time, invite further proposals or such other submissions for the provision of the services, or enter into any discussions or negotiations with any party for the provision of such services.

No alterations, amendments or additional information will be accepted after the closing date and time unless invited by the City. The City, at its sole discretion, reserves the right to cancel this RFP at any time.

7.4 All Proposals Public

All Proposals submitted to the City will be received and held in confidence and will become the property of the City.

The City is bound by the provisions of the Freedom of Information and Protection of Privacy Act. Proponents submitting proposals are advised that such proposals may be treated as public documents, and the contents of the same may be disclosed upon written request, if required to do so pursuant to the Act.

7.5 Closing Date

Proposals will be received by the City on or before 2:00 pm local time

Tuesday, December 9, 2014

(Closing date and time)

7.6 <u>Instructions for Proposal Submission</u>

Proposal submissions are to be uploaded through Qfile, the City's file transfer service accessed at website: http://qfile.coquitlam.ca/bid

- 1. In the "Subject" field enter: RFP Number and Name
- 2. Add files in .pdf format and Send (ensure you receive 2 emails from Qfile to confirm upload is complete)

Proponents are to allow ample time to complete the submission process. For assistance Ph: 604-927-3060 or Fax: 604-927-3035.

Proposals submitted shall be deemed to be successfully received when displayed as new email in the in-box of the City email address. The City will not be liable for any delay for any reason including technological delays, or issues by either party's network or email program, and the City will not be liable for any damages associated with Proposals not received.

The City reserves the right to accept Proposals received after the closing date and time but is under no obligation to evaluate.

Proposals will not be opened in public.

Proposals may be withdrawn upon request by an authorized representative of the Proponent, sent to email: bid@coquitlam.ca prior to time set as closing time for receiving Proposals.

7.7 Acceptance Period for Proposals

The City requests that Proposals received as a result of the RFP be open for acceptance for a period of 60 days from the Closing Date. Proponents are requested to confirm the period for acceptance.

7.8 No Binding Contract

The City may, after reviewing the Proposals received, enter into discussions with one or more of the Proponents, without any such discussions in any way creating a binding contract between the City and any Proponent. There will be no binding agreement with the City until a formal, written agreement has been negotiated with a Proponent and/or a City purchase order has been issued.

7.9 Communication with Proponents and Addenda

Questions are to be submitted 3 business days prior to the closing date quoting the RFP name and number sent to email: bid@coquitlam.ca

If a change or additional information is warranted, the City's response will be communicated to all Proponents by means of written Addenda issued prior to the closing date and will be issued by posting on the City's website.

Proponents are required to check the City's website before the closing date for addenda and updated information at www.coquitlam.ca/bidopportunities

Upon submitting a Proposal, Proponents are deemed to have received all Addenda and deemed to have considered the information for inclusion in the Proposal submitted.

Should there be any discrepancy in the information provided; the City's original file copy shall prevail.

7.10 <u>Fees</u>

All monetary references in a Proposal must be in Canadian currency. Proposal fees shall be structured in a fee matrix showing the level of effort by each team member, anticipated hours, fee rates and a total Lump Sum Fee that includes all disbursements and overhead.

All information contained in this RFP and any resulting addenda will be incorporated into any agreement between the City and the successful

Proponent, and therefore, must be considered by the Proponent in preparing their Proposal.

There will be no opportunity to make any additional claim for compensation for additional charges that were not considered and included in the Proposal lump sum fee submitted, unless the City, at their sole discretion, deems that it would be unreasonable to do so, or there is additional services added to the Scope of Services.

8.0 GENERAL CONDITIONS

The following general conditions will apply to this contract.

8.1 Notification of Award

The City will notify the successful Proponent ("Consultant") in writing of its decision to award the services. Award and issue of a City Purchase Order (PO) is contingent upon sufficient funds being available in the City's budget.

8.2 <u>Indemnification</u>

The Consultant shall indemnify and save harmless the City, from and against all losses and all claims, demands, payments, suits, actions, recoveries and judgements of every nature and description, brought or recovered against its firm and/or the City, by reason of any act or omission of the Consultant, its agents, sub-Consultants or employees in the execution of the Services.

8.3 Business License

The Consultant shall maintain a City of Coquitlam or Tri-Cities Intermunicipal Business License. For information, contact the City's License Department (Tel: 604-927-3085).

8.4 Intellectual Property Rights

The Contract establishes the owner of the "Instruments of Service" in connection with this Project.

The Consultant will remain owner of all Instruments of Service but the City will become the owner of the design, reports, data, and other materials requested and provided as defined as deliverables under this RFP.

8.5 Cancellation

The contract may be cancelled by either party for any reason without cause or penalty upon 30 days written notice and the Consultant would be compensated for services and deliverables provided to that point in time.

8.6 Law

The RFP and any resultant award shall be governed by and construed in accordance with the laws of the Province of British Columbia, which shall be deemed the proper law thereof.

9.0 PAYMENTS - INVOICING

Upon award, a City Purchase Order (PO) will be issued to the Consultant based on the proposal submitted, and as finally negotiated to complete the Services. Invoice amounts in excess of the PO will not be accepted. In case of extenuating circumstances, the City may approve additional costs for additional Services which will require written City approval before any additional Services are provided.

Invoices are to be sent in .pdf format to email: apinvoices@coquitlam.ca, the City's Finance Division, Attention: Accounts Payable, and must indicate the Project Name, the PO Number and the City's Project Manager's name.

Payment for Services provided will be in accordance with the City PO and made at the agreed hourly rates for personnel and the monthly costs for approved disbursements. Disbursements such as photocopying, computers, faxes etc. should not be invoiced and will not be paid. The hourly rate amounts charged always reflect the cost of doing business and, therefore, payment for these types of disbursements will not be considered.

Invoices submitted are to be accompanied by a summary cost status sheet of information regarding hours budgeted, hours spent to date, and projected total hours, all with associated costs. If the work indicated on the summary sheet and on the invoice is confirmed and approved by the Project Manager, payment is made to the Consultant net 30 days after the invoice is received by the City.

Please be advised that, at any time, the City may request justification and supporting documentation for the hours of work or level of effort in the provision of the Services shown on an invoice.

10.0 PROPOSAL SUBMISSION AND EVALUATION CRITERIA

Proposals will be evaluated by City staff according to the following criteria. This list is not intended to be exhaustive and is not ranked in order of preference or priority. The proposal submission should be brief and concise and include the following components:

10.1 Proponent Qualifications

- a) Company Profile a brief profile of the company outlining its history, philosophy and target market;
- b) Team composition The Proponent is required to bring forward an experienced project team with the appropriate skill sets and expertise to carry out the work as identified in this RFP. Include a complete listing of all key personnel who will be assigned to this project. This will include their relevant experience and qualifications, roles and responsibilities and availability;
- c) Demonstrated Team Experience and Success provide a list of past successful projects of a similar size and scope including a description of team members role in each project, project dates, client names and contact information, and
- d) References A minimum of three (3) recent and similar client references.

10.2 Work Plan & Methodology

- a) Project Methodology propose a detailed project methodology explaining each project task that will be employed to meet the objectives of this project. Include a section that describes the role of both the consultant and the City with respect to each task necessary to complete the Scope of Services as described in this RFP. Include a narrative describing any changes or additions to the Scope of Work you would recommend to strengthen the overall goal;
- b) Project Objectives a description of the consultant's understanding of the project objectives/outcomes and vision, and how these will be achieved;
- c) Deliverables –a proposal of what will be delivered, including the expected outcome and expected benefits to the City of Coquitlam;

- d) Timeline a schedule of all activities, including milestones, project meetings, interim reports and progress reports required for this project;
- e) Communication Strategy a communication plan for community and committee consultation, documentation preparation and presentation materials.

10.3 Price

- a) Proposal Price for Scope of Services a fee matrix with hourly rates and charges by level of effort (hours) associated to task and total lump sum fee including all applicable taxes and disbursements;
- b) Value Added Services Describe your competitive advantage, value added services and benefits that would be provided to the City. This could include any innovative approaches you have previously used to help communities develop their plans, what unusual challenges you faced during the planning process and how you overcame them.

10.4 Proposal

- a) The proposal submission should be clear, concise, complete and an aesthetic representation of the Proponent's marketing materials;
- b) List of all documents or data that would be required.

10.5 Criteria for Assessment

The Evaluation Committee will only evaluate proposals that address all the criteria listed above and the evaluation will be based upon information in the Proponent's proposal, information from oral interviews, reference checks and other pertinent factors. Description of the evaluation criteria, and their relative importance, are as follows:

Description of Criteria				
Proponent Qualifications				
(a)	Corporate profile;			
(b)	Proposed team's qualifications/experience;			
(c)	Demonstrated relevant experience, competence and reliability in performing similar planning initiatives;			
(d)	Contributions in improving the planning processes of municipalities or other related organizations;			
Proposed Workplan and Methodology				
(a)	Proposed project methodology;			
(b)	Understanding the Scope of Services, Objectives and Deliverables;			
(c)	Schedule;			
Price		20%		
(a)	Rates and fees structure;			
(b)	Value-added benefits;			
Proposal				
(a)	Format, quality, aesthetics, clarity and conciseness of proposal.			
Interview				
TOTAL				

The Evaluation Committee will review the proposals and may consider other criteria that it deems to be relevant. The Evaluation team may also, at its discretion, request clarifications or additional information from a Proponent with respect to any Proposal, and the Evaluation Committee may make such requests to only selected Proponents. The Evaluation Committee may consider such clarifications or additional information in evaluating a Proposal.

When the City selects Preferred Proponent(s), it will invite them to an interview to confirm the expectations of the City and gain understanding of how those expectations will be met and clarify any outstanding issues.

The City may also enter into discussions with a Preferred Proponent to finalize the terms of a Contract, including negotiation of scope of services and financial terms to meet with budget.

The City reserves the right to accept or reject any or all proposals or cancel this RFP at any time at the City's sole discretion.

Proponents agree that by submission of their proposal, they agree the City may disclose the name of their company. However, no totals, weights, prices or scores will be provided to any Proponent.

Should the City proceed with additional services in future phases, the City reserves the right to sole source with the successful Proponent, or invite select companies to submit proposals or, may issue a new Request for Proposals.

Based on the evaluation results, The City may also create a shortlist of one or more pre-qualified Consultant(s) that may be utilized for future similar projects based on community needs with budget approval. Submissions from the pre-qualified Consultant(s) will remain on file for a period of three (3) or more years or until such a time as the City may release a new request for Proposals. The City makes no representation of any kind as to the volume of projects. The City also reserves the right to implement a separate pre-qualification process where more specialized services or projects are involved.

11.0 REFERENCE MATERIALS

Proponents should identify any relevant documents or data that would contribute to achieving the objectives. If such data requires any original research, the Proponent should identify any costs as a separate item for consideration by the City.

11.1 Available Material

Information currently available includes:

- City of Coquitlam Corporate Strategic Plan (2012-2015);
- OCP and other Community Plans;
- City of Coquitlam Cultural Services Strategic Plan 2010-2020 (2010);
- Public Art Policy and Program (2011);
- Celebrate Coquitlam Strategy (2011);
- Economic Action Plan (2009) and Coquitlam Tourism Blueprint (2010);
- Allocation Policy (Fees and Charges Bylaw, 2013);
- Artificial Turf Conditions of Use Policy (2008); and
- Draft PRC Master Plan (2014) as updated