



Portugal Cove St. Philip's

Town of Portugal Cove-St. Philip's

Request for Proposals **Organizational Review**

Issue Date: August 17, 2023

Deadline for proposal submissions is
Thursday, August 31, 2023

INTRODUCTION

The Town of Portugal Cove-St. Philip's is issuing a request for proposals (RFP) from qualified, professional and experienced consultants or consultant firms, for the completion of an organizational and operational review. The consultant shall be expected to provide a clear document that outlines an organization-wide current state analysis in terms of structure, operational functions and staffing levels as well as provide considerations and recommendations that will enhance current operations and meet future needs.

Proposals should be sent or emailed to:

Town of Portugal Cove – St. Philip's

Attn: Jody Murray, CAO

1119 Thorburn Road

Portugal Cove – St. Philip's, NL

procurement@pcsp.ca

All bid proposals must be received by **2:00 p.m. on Thursday, August 31, 2023**. After which time no further proposals will be accepted. Proposals will be opened at 2:30pm on Thursday, August 31, 2023 via digital means. Please submit two sealed envelopes (or emailed files) – one with qualifications and a second with pricing information. All proposals must be in separate sealed envelopes (or emailed files) identifying them as **“Proponent Name – Qualifications – RFP #PCSP-HR-2023-20 Organizational Review”** and **“Proponent Name – Cost- RFP #PCSP-HR-2023-20 Organizational Review”**.

If you have any questions regarding the RFP please contact procurement@pcsp.ca. Questions should be submitted, in writing, at least four (4) business days prior to the closing time and date. No amendments will be issued two (2) business days prior to closing.

BACKGROUND

Portugal Cove – St. Philip's is built upon the history and heritage of two unique communities, which amalgamated in 1992. Together this place provides our residents the opportunity to live in a modern, yet traditional community in rural coastal setting.

The Town of Portugal Cove – St. Philip's aspires to be a sustainable and complete community, offering residents and visitors access to connected and safe neighbourhoods, natural open spaces, agricultural lands and soaring coastlines. A vibrant heritage combined with increased economic opportunities has created a preferred place for people to live and grow, to be close to work, to pursue recreation, to invest and to visit.

The Council for the Town of Portugal Cove-St. Philip's has been elected to deliver identified municipal services to the residents of the Town in the most efficient and effective manner. This Council is comprised of seven individuals: a Mayor, Deputy Mayor, and five Councillors. The Town's administration is under the direction of a Chief Administrative Officer (CAO) and team of dedicated staff. There are six departments, each led by their respective directors:

1. Administration and Finance
2. Economic Development, Marketing and Communications
3. Fire Department/Protective Services
4. Planning and Development
5. Public Works
6. Recreation and Community Services

The Town of Portugal Cove-St. Philip's has been through a number of organizational challenges in recent years, such as turnover in CAO and management positions, as well as the impending retirement of the fire chief, an increase in population and expansion of service needs. The Town is overdue for an organizational update to efficiently meet the changing needs of our growing community.

A review of organizational structure is necessary to ensure alignment of departmental responsibilities and to ensure the right individuals are in the right positions and performing the right duties at the right time to plan for the future.

SCOPE OF WORK

The proponent will be tasked to:

1. Review current organization structure and alignment of departmental service responsibilities.
2. Make recommendations related to projected service needs and staff requirements leading ten (10) years into the future.
3. Provide a commentary on external pressures and legislative requirements facing the municipal organization, along with projection of the impact they will have on future workloads and the organizations' means to address them.

4. Based on the results of the review, provide a series of recommendations regarding current and future organizational structure and staffing needs to:
 - improve clarification of roles and responsibility
 - improve service delivery to residents
 - establish appropriate and necessary staffing levels
 - strengthen communications and coordination between departments
 - provide opportunities for staff development
5. Make recommendations related to the organization of staff and related resources required for the Town's efficiency delivery of mandated and discretionary services.
6. To consult with Council and management to understand any concerns there are currently or possibly in the future, that relate to municipal facilities and its impacts on Council and municipal administration operations and public suitability.
7. To recommend the best process to undertake a more complementary review to identify current and future workplace needs and make recommendations related to more effectively meeting public service and operation efficiency needs.
8. No form of external consultations will be required as part of this scope of work. Information collected from the public by the Town as part of other consultation processes can be supplied after the project has been awarded to the successful proponent. Any additional external/community consultations can be proposed as a value-added service to be considered by the Town post-award. The inclusion of external consultation proposals will not affect the evaluation of this RFP.
9. The final product, and any supporting documentation shall be property of the Town and provided by the Consultant in an appropriate format. The final report may be a typical 8.5" x 11" report or a landscape PowerPoint style format. The consultant team must also be prepared to give an in-person final presentation to council.

FINAL DELIVERABLE GRAPHICS REQUIREMENTS

The final deliverable for the Organizational Review elements of this project shall include the following minimum set of tables and graphics:

- 1) Graphical image that categorizes key observations into meaningful categories. A suitable set of categories may include:
 - a. Strategy (alignment to vision, strategy, mission, etc.)

- b. Structure (organizational structure, work alignment, duties, etc)
 - c. Processes (Lateral Capability, Systems, Technology, etc.)
 - d. People Practices (Staff Engagement, Performance, Training, etc.)
 - e. Culture (Values/beliefs, Behaviours, etc.)
- 2) Table outlining key observations and associated recommendations along with assessments and rankings of their expected impact and their expect level of effort.
 - 3) Map/Graph with "Impact" on one axis and "Effort" on the other axis showing all of the recommendations with color coding by key observation category.
 - 4) Roadmap outlining when the various key initiatives should be implemented over the next 5 years.
 - 5) A series of structural options graphics that generally outline the general organizational structures types that were considered along with an assessment of the advantages/disadvantages of each structure type.
 - 6) A set of potential organizational structures for the Town of Portugal Cove St. Philip's with a discussion of the advantages/disadvantages of each and a ranking from the consultants as to which are most suitable.
 - 7) Detailed organizational design break-outs for each Department for the top two recommended organizational structures with a description of the rationale and key recommendations applicable to each department.
 - 8) Summarized versions of large graphics if needed to use in executive summaries.

Please submit up to three samples (minimum of 1) of recent organizational reviews similar in scope, citing the work completed and links to live sites if available. If reviews cannot be provided due to intellectual property limitations, then summaries of the reviews or written explanations of the work in your proposal may be acceptable. The intent of reviewing this material is to demonstrate your capability to produce a report with analysis and corresponding graphics that will adequately meet the Town's needs.

INFORMATION FOR PREPARING BID

The information provided on the town's website is the best available at the time proposals are solicited. Proponents shall use the available information as a basis for any proposal. The proponent shall allow for any conditions deemed reasonable and appropriate for the performance of the work as outlined in the Request for Proposal and incorporate such reasonable allowances in the proposal.

SCHEDULE AND REQUIRED DEADLINES

Assessment of current roles, responsibilities and workspace, active engagement with staff, management and members of Council, are all critical components in the development of a successful Organizational Review.

The Town is seeking a consulting team that will provide a comprehensive assessment of the current organizational structure, gap analysis summary and a design future state including transitional implementation plan.

The consultant will be required to submit a summary assessment and interim report of the current state of operations and gap analysis findings by the following date:

- **September 29th, 2023**

The consultant will be required to submit the final report with the complete organizational review and be prepared to present to council by the following date:

- **October 27th, 2023**

These dates are mandatory and cannot be moved post award. Please consider your availability to meet these dates before deciding to bid. If these dates cannot be met, please communicate with the Town during the open call period so that an addendum can be considered at the discretion of the Town. Bidders that cannot meet the dates will be disqualified during the administrative and mandatory items evaluation.

FORM OF PROPOSALS

All proposals must be received by **2:00 p.m. on Thursday, August 31st, 2023**, after which time no further proposals will be accepted. Proposal will be publicly opened via digital means at 2:30pm on Thursday August 31st, 2023. Please submit two sealed envelopes (or two electronic files) – one with qualifications and a second with pricing information. All proposals must be in separate sealed envelopes (or emailed files) identifying them as “Proponent Name – Qualifications – RFP #PCSP-HR-2023-20 Organizational Review” and “Proponent Name – Cost- RFP #PCSP-HR-2023-20 Organizational Review”.

Addressed to: Jody Murray, CAO
Town of Portugal Cove – St. Philip’s
1119 Thorburn Road
Portugal Cove – St. Philip’s
procurement@pcsp.ca
RFP #PCSP-HR-2023-20- Organizational Review

All responses to inquiries will be shared with all proponents who have previously obtained the RFP information. It is the proponent's responsibility to clarify any details prior to submitting a proposal. The Town of Portugal Cove – St. Philip's will assume no responsibility for any oral instruction or suggestion. Any additional information pertinent to the proposal should be included.

OMMISSIONS AND DISCREPANCIES

If the proponent finds discrepancies in, or omissions from, the proposal documents or is in doubt of their meaning, they should advise the Town immediately. Responses, if not already addressed in the RFP, will be addressed in the form of an addendum if required. No oral interpretations will be effective to modify any provisions of the Proposal, unless an addendum has been issued by the Town, prior to the advertised close date and time.

PROCESSING OF PROPOSALS

On receipt by the Town, of the properly submitted proposals by **2:00pm on Thursday August 31st, 2023** delivered by or on behalf of a proponent, envelopes or email files will identify the time and date of receipt and will be retained unopened until the public opening of all proposals on Thursday, August 31st 2023, at 2:30 p.m.

Town staff may clarify any aspect of a proposal with the proponent at any time after the proposal has been opened. Any such clarification will not alter the proposal or constitute as a negotiation or renegotiation of the proposal. The Town of Portugal Cove – St. Philip's is not required to clarify any part of a proposal.

Proposals must contain sufficient detail to support the project being proposed. Incomplete submissions may not be considered. Any clarification of a proposal by a proponent shall not be effective until confirmation has been delivered in writing. In conducting clarification/discussion with proponents, there shall be no disclosure of any information derived from proposals from competing proponents.

The selection committee will first review the qualifications document to determine which proponents meet the qualification requirements. All proponents who are deemed qualified will have their cost document opened and reviewed prior to selection. Any proponents who do not meet the outlined qualification requirements will not have their cost document opened.

Following the selection committees review the selected proposal will be submitted to Council for their review and approval. The successful proponent will be notified after Council awards the contract via a motion of council. The issuance of this RFP in no way implies the Town will proceed with an order or contract. The Town will not reimburse any proponent for any costs incurred in preparing, submitting and presenting a proposal.

The successful proponent shall be required to enter into an agreement with the Town, the execution of which shall be a condition of final and binding acceptance of the preferred proposal, and such agreement shall incorporate the proponent's proposal as performance and implementation criteria.

The proposal submission is irrevocable and open for acceptance by the Town of Portugal Cove – St. Philip's until sixty (60) days after the closing of the proposal.

PROPOSAL RESPONSE FORMAT

In order to facilitate the analysis of response to this RFP proponents are required to prepare their proposals in accordance with the instructions outlined in this document. Proponents whose proposals deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of the Town.

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proponent's capabilities to satisfy the requirements of the RFP. All parts, pages, figures, and tables must be numbered and labeled clearly. The proposal should be organized into the following major parts:

DOCUMENT ONE – QUALIFICATION SUBMITTAL

- i. **Cover Letter** – The proposal must contain a cover letter which provides an executive summary of the project.
- ii. **Company Identification** – The following information will be required,
 - Name and address, phone number, fax number and email address.
 - The name, title, email and all contact information for the consultant's main representative working on the project.
 - Description of the Business including the type of services provided, total number of employees and head office/branch locations.

- iii. **Project Manager** – This section shall identify the project manager, and any other personnel that will be involved in the project. It shall describe their roles, skills and qualifications.
- iv. **Comprehension** – This section will outline the consultant’s understanding of the work being requested and the consultant’s vision for the project.
- v. **Methodology** – The proposal must include a section explaining the consultant’s planned approach to the project, the specific tasks and deliverables, how stakeholders will be engaged and the project’s time frame and milestones.
- vi. **Schedule** – Time management is a critical aspect of this project, the proposal shall outline the activities that will be undertaken in chronological order, outlining each activity, the time frame dedicated to it and the personnel that are assigned to it.
- vii. **Client References** - Include in your proposal a list of three or more customers for whom the proponent has provided similar projects. Information must include the following:
 - Name of client, including contact person with phone and email address
 - Description and date of service that the proponent provided
 - Any photos of work provided
- viii. **Sample Works** – Please submit up to three samples (minimum of 1) of recent organizational reviews similar in scope, citing the work completed and links to live sites if available. If reviews cannot be provided due to intellectual property limitations, then summaries of the reviews or written explanations of the work in your proposal may be acceptable. The intent of reviewing this material is to demonstrate your capability to produce a report with analysis and corresponding graphics that will adequately meet the Town’s needs.

DOCUMENT TWO – COST SUBMITTAL

- i. **Project Cost** – The proposal must include a detailed project cost summary and development plan outlining the timing and anticipated costs. The cost should be based on the services required in the Scope of Services which are itemized, with sub-tasks included where necessary.

EVALUATION MATRIX

Experience and Qualifications		32
Competitive Advantage		8
2	Experience in the preparation of organizational reviews for municipalities of comparable size and complexity	
2	Demonstrated ability to provide a full range of professional services in all areas outlined in the Scope of Work.	
2	Demonstrated project completion records for similar organizational reviews	
1	Notable awards and or recognition	
1	Number of years in operation and a description of company	
Resumes		8
2	Communication, data collection and presentation skills	
2	Clarity of roles and contribution of each proposed team member	
2	Depth, experience, qualifications and availability of all project team members	
2	Experience of the project manager – demonstrated leadership on projects of similar scope	
Quality of Work Examples and References		16
6	Relevance of references to at least three (3) similar projects for municipalities of similar size and scale	
6	Overall endorsement quality provided by listed references	
4	Quality of submitted work examples to demonstrate capability to meet the organizational review analytical and graphical requirements of the project	
Approach, Methodology and Schedules		15
3	Approach to management of the work to achieve milestones according to schedule, quality control and timing of deliverables	
3	Completeness of proponents work plan	
3	Demonstration of creative and value-added approaches to staff engagement	
3	Project implementation plan	
3	Proposed frameworks and methodologies	
Understanding of the Project		15
4	Ability to develop core themes and action plans based on analysis	
4	Demonstration of understanding the objectives, deliverables and scope of the project	

4	Recognition of challenges and opportunities associated with the project and strategies to overcome challenges	
3	Clear understanding of municipal government structure	
Completeness of the Submission		8
4	Demonstration of understanding key stakeholders	
Y/N	All components required in RFP provided	
4	Overall quality of the proposal	
MINIMUM SCORE REQUIRED TO OPEN COST DOCUMENT: 49		
Cost Proposal		30
Y/N	Clarity of cost proposal	
Y/N	Detailed budget that includes an estimate of all associated costs per line item outlined in scope of work	
30	Costs relative to stated scope of work (See Financial Evaluation	
Best Value Evaluation		
	Technical Evaluation (Out of 90)	
	Financial Evaluation (Out of 10)	
	Combined Score (Out of 100)	
		100

TECHNICAL EVALUATION

The content of proposals submitted must achieve from the evaluation committee a minimum score of 49 of the 70 points available in order to be considered further.

FINANCIAL EVALUATION

The Proponents whose proposals meet the technical evaluation will be given a value relative to the lowest cost of services, which will be assigned a maximum value of 10. The cost of evaluation is as follows:

$$Points\ Awarded = \frac{Lowest\ Proposal\ Cost}{Proposal\ Cost\ Being\ Evaluated} \times Total\ Points\ Available\ for\ Cost$$

Note that a review of a cost proposal may result in the rejection of a bid at the discretion of the evaluation committee in any of the following circumstances:

- There are tabulation errors or unclear descriptions of costs in the cost proposal.
- The cost proposal fails to include a detailed budget that includes an estimate of all associated costs attributed to line items outlined in the scope of work.
- The total cost exceeds the estimated cost allocated by the Town for this work.

COMBINED SCORE OF TECHNICAL AND FINANCIAL EVALUATION

The preferred proponent will be selected on the basis of the highest overall score achieved by totaling the technical score with the financial evaluation score.

The owner is not bound to accept the lowest cost or any proposal.

PROVINCIAL SUPPLIER REFERENCE

As required by the Public Procurement Regulations under the Newfoundland and Labrador *Public Procurement Act* (the "Procurement Regulations"), a ten percent (10%) reduction will be **temporarily** applied to the pricing submitted by provincial suppliers **only** for the purposes of evaluating pricing.

A "provincial supplier" is defined in the Procurement Regulations as a supplier of goods, services or public works that has a place of business in the province of Newfoundland and Labrador.

A "place of business" is defined in the Procurement Regulations as an establishment where a supplier regularly conducts its activities on a permanent basis.

Indicate here if you are a Provincial Supplier: **YES** **NO**

The Town may require a bidder to provide information and/or documentation to confirm they are a "provincial supplier", as defined above.

PRE-SELECTION MEETINGS

The evaluation committee reserves the right to conduct pre-selection meetings with Consultants, which may include a run-through of the proposal submission.

NOT A TENDER

This is a Request for Proposal and not an invitation to tender. No contractual, tort or other legal obligations are created or imposed on the Town of Portugal Cove – St. Philip's, or any

other individual, officer or employee of the Town by the Request for Proposal documentation or by submission or consideration on any proposal by the Town.

CONTRACT AWARDING

Contract awarding is dependent on decisions of the Portugal Cove-St. Philip's Town Council. The selection committee will consist of members from the project steering committee who shall make a recommendation to Council for approval.

INDEMNITY

You warrant and agree to indemnify and hold harmless the Town(s), its officials, officers, employees, agents and authorized representatives from any and all liability, injuries, physical injuries (including those resulting in death), damages, losses, demands, costs, expenses and claims of any kind, including but not limited to legal fees and disbursements, resulting from or relating in any way to the development of this Plan and Evaluation.

SUBMISSION

By submitting comments, suggestions, ideas, questions, or other information you irrevocably waive all rights, whether legal or moral, thereto and further grant the Town(s) rights in and to such submissions, which include an unlimited, non-exclusive, irrevocable, royalty-free, right to use, modify, adapt, publish, reproduce, translate, or create derivative works there from.

INTELLECTUAL PROPERTY / OWNERSHIP OF WORK PRODUCT

The successful proponent must agree to irrevocably assign to the Town all right, title and interest worldwide in and to any deliverables specified in the project and to any ideas, concepts, processes, discoveries, developments, formulae, information, materials, improvements, designs, artwork, content, software programs, other copyrightable works, and any other work product created, conceived or developed by the proponent (whether alone or jointly with others, including employees or agents of the proponent) for the Town during or before the term of this Agreement, including all copyrights, patents, trademarks, trade secrets, and other intellectual property rights therein (collectively, the "Work Product"). The proponent will retain no rights to use the Work Product and agrees not to challenge the validity of the Town's ownership of the Work Product.

DISCLOSURE OF INFORMATION

This procurement process is subject to the Access to Information and Protection of Privacy Act, 2015. The financial value of a contract resulting from this procurement process will be publicly released as part of the award notification process.

The bidder agrees that any specific information in its bid that may qualify for an exemption from disclosure under subsection 39(1) of the Access to Information and Protection of Privacy Act, 2015 has been identified. If no specific information has been identified it is assumed that, in the opinion of the bidder, there is no specific information that qualifies for an exemption under subsection 39(1) of the Access to Information and Protection of Privacy Act, 2015.

By submitting a Proposal, the Proponent represents and warrants to the Owner that the Proponent has complied with applicable Laws, including by obtaining from each person any required consents and authorizations to the collection of information relating to such individual and to the submission of such information to the Owner, and the use, distribution and disclosure of such information as part of the Proposal for the purposes of, or in connection with, this RFP and the Competitive Selection Process.

For further clarification on Access to Information and Protection of Privacy disclosure requirements for Public Procurement, see the guidance document from the Office of the Information and Privacy Commissioner at the following link:

<http://www.oipc.nl.ca/pdfs/PublicProcurementActAndATIPPA2015.pdf>

RIGHT TO CANCEL

The Town of Portugal Cove – St. Philip’s in its sole discretion reserves the right to cancel this RFP at any point in time until a signed agreement is executed with a successful proponent and the Town of Portugal Cove – St. Philip’s. The Town and its agents will not be held liable for any expenses that may have been incurred by the contractor or its agents or affiliates for this RFP should an agreement not occur.