

**TOWN OF WHITCHURCH-STOUFFVILLE**

**REQUEST FOR PROPOSAL**

**WS-RFP-06-27**

**PROJECT MANAGEMENT SERVICES**

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**PROJECT MANAGEMENT SERVICES**

**SECTION A  
TERMS OF REFERENCE**

**1. Background Information**

The Town of Whitchurch-Stouffville is initiating a capital building renovation project for the adaptive reuse and revitalization of the Old Town Hall building located at 19 Civic Avenue in Downtown Stouffville.

The Old Town Hall was built in 1903 and was originally designed as a concert hall. It was converted into a movie theatre (Stanley Theatre) in 1923. The Village of Stouffville used the building for municipal office and council meetings between 1959 and 1970. With regional amalgamation, the Town of Whitchurch-Stouffville continued to use the building for municipal offices and council meetings until 1998.

The building represents one of the oldest and most culturally significant buildings in the Downtown Core Area. The two and one-half storey brick building is defined with its gabled parapet, corbelling, plinths, decorative brickwork façade and trimmed windows. Culturally significant, this building has over its past represented an important meeting place and centre for social activities in the Town. The Old Town Hall is representative of the public and commercial development of downtown Stouffville and is an important symbol of municipal government. In combination with Civic Square and the Clock Tower, the Old Town Hall precinct is a predominant cultural landscape in the downtown core and is an important space symbolically associated with the Town's industry.

Through the passage of By-law 2002-169-DS, Council on November 5<sup>th</sup>, 2002, designated the Old Town Hall and the Clock Tower as having historic and/or architectural value or interest under the authority of the Ontario Heritage Act, R.S.O., 1990.

At the June 20, 2006 Town Council Meeting, Council adopted the preliminary business case plan for Nineteen on the Park as the preferred use of 19 Civic

Avenue which would see the building used as flexible programming space for the arts, cultural and entertainment sectors to serve as a catalyst in Downtown revitalization.

As part of the approval, Council has directed staff to engage the services of a Project Manager to oversee the design and development of this project. The responsibilities of the Project Manager are outlined below in Section A, Part 2.

The Town of Whitchurch-Stouffville has previously retained the services of Novita Interpares Ltd. to assist in the development of the concept plan for the future use of the Old Town Hall building located at 19 Civic Avenue.

As part of the Request for Proposal process, it is the responsibility of the proponents to account for and include in their submission services relating to business planning; governance and operations; and a strategy for capital revenue planning.

Proponents may contact Novita Interpares Ltd. or any other cultural planning consultant to develop this component of the proposal, or, alternatively, utilize in-house resources if available.

To facilitate the compressed timeframes associated with this project, the Town of Whitchurch-Stouffville will be initiating a Request for Proposal for Architectural Services concurrent with this Request for Proposal for Project Management Services.

It is expected that the selected Project Manager will promptly integrate into the selection process for Architectural Services.

## **2. Project Manager - Service and Skill Requirements**

It is expected that beyond Project Management skills as listed below, the successful respondent will retain the services of an expert in Cultural Planning/Revenue Securement. This individual may be part of the successful firm or a sub-consultant.

### *Program Evaluation and Conceptual Design*

- Consult with staff and representative users to establish program needs and requirements;

- Provide alternative schemes to address the program needs and requirements;
- Present the preferred alternative to the Project Implementation Committee (PIC);
- Identify alternative funding opportunities through grants/innovation, support programs, community fundraising, etc. in the form of a Capital Revenue Planning Strategy;
- Present the Capital Revenue Planning Strategy to the PIC;
- Provide the necessary liaison with community groups, corporations, government agencies, private sector foundations to assist in securing grants, etc.;
- Prepare government agency and private sector foundation grant application forms, etc. for submission by the PIC;
- Provide monthly written reports to the PIC on the progress to-date on all activities, and, identify any emerging issues or concerns;
- In all phases of the project, the Project Manager will monitor progress to ensure that the program remains on time and on budget;
- To host meeting(s) with the adjacent landowners to update them on the progress of the project and to deal with any concerns raised during the project.

### Design and Construction

- Assess and recommend an Architectural/Engineering Services firm based upon the Request for Proposals as circulated by the Town to the PIC;
- Engage on behalf of the Town the services of the Architect/Engineer in accordance with Town practices;
- Oversee the completion of design development for the project;
- In association with the Architect/Engineer present design concepts to the PIC, inclusive of a Final Design;
- In consultation with the Architect/Engineer, prepare a detailed pretender budget estimate of the Final Design;
- Provide support services to the PIC with respect to the submission of a Report to Council on the Final Design;
- Oversee the pre-qualification process of contractors;
- On approval by Council to proceed forward with the project, oversee the preparation of the Tender package by the Architect/Engineer and the circulation of the Tender to pre-qualified bidders.

### Contract and Construction Administration

- Establish a process in which the Contractor and the Architect/Engineer are monitored, and managed to meet requirements for project completion; quality control; and, budget allowances;
- Monitor the Contractor's co-ordination, general direction and inspection of all sub-trades and installation of work on site;
- Monitor the Contractor's overall site security and safety;
- Obtain the certifications for the completion of various stages of construction, and, review and recommend for approval to the PIC all progress payments of the Contractor and Architect/Engineer;
- Arrange and certify all required inspections and testing requirements;
- Prepare a Final Report to the PIC in a form acceptable for submission to Council on the completion of the project;
- Participate as required in post construction warranty and Contractor follow-up.

### 3. Proponent's Qualifications

The respondent should have experience in the following areas:

- A sound knowledge of municipal facilities with emphasis on restoration and revitalization projects involving heritage structures
- Public consultation skills; Technical understanding of construction, operation and budgeting of community facilities;
- Ability to work with users groups and identify their needs;
- Ability to identify potential partners for the development and/or operation of this facility

### 4. Working Relationship

The Town of Whitchurch-Stouffville will assign a contact person to act as the lead on this contract. The Project Manager shall meet on a regular basis with the Town's Project Implementation Committee (PIC) and will provide monthly written progress reports to the PIC.

## 5. Selection Process

The following schedule of events will apply to the selection process. The selection process will include interviews with short listed candidates:

<b>Event:</b>	<b>Date:</b>
Release of RFP	August 31, 2006
Deadline for submission of proposal	September 8, 2006 at 12:00 noon
Interviews	September 12, 2006
Projected Council Approval	September 19, 2006

## 6. Proposal Criteria

The Town is asking a limited number of project management firms to submit a Proposal to undertake this project. In preparation of their proposal, consultants are requested to have regard for the circulated Terms of Reference and provide as a minimum, the following information:

- A detailed description of the approach to be used in completing each component of the project.
- A specific timetable and work plan for the various phases of the project.
- A description of the project management firm and the names of the consultants and sub-consultants who will participate in the Project, including their resumes and a description of their related experience. (Any fees associated consultants and sub-consultants shall be paid for and supervised by the successful bidder.)
- Specific roles and responsibilities which will be assigned to each person involved.
- A detailed budget and breakdown of consultant and sub-consultant hours on the project.
- The Project Manager should identify the total project costs (including all disbursements, professional fees, sub-consultant fees and GST). This costing shall represent the upset limit for the project.
- Current project commitments including available time and resource dedication to this project(s).
- The Project Manager shall identify any potential conflicts that the Project Manager or a specific individual(s) working on the project may have.

**\*Note: The cost of preparing and submitting the Proposal shall be at the Project Manager's expense.**

**7. Proposal Evaluation Criteria**

An evaluation team consisting of relevant Town staff will conduct the evaluation of the Proposal. Evaluation criteria will include, but not be limited to the following:

- Experience with comparable projects including demonstrated ability to meet budget and timeframe parameters;
- Community consultation experience;
- RFP development and evaluation experience;
- Qualified staff who have demonstrated knowledge of community facility design and construction;
- Project fees;
- Local knowledge;
- Qualifications of project staff;
- Approach and methodology;
- Stability and reputation of the firm;
- Willingness to sign a contractual agreement with the Town to complete the project

**8. Project Budget**

The projected cost to complete the renovation/retrofit of 19 Civic Avenue is \$2.5 million. This budget figure is inclusive of all costs related to Capital Construction, Fit-up/Leasehold Improvements, Consulting Fees, Site Services, Contingency Allowances and Applicable Taxes.

9. **Project Timeline**

Listed below are anticipated key dates for the planning and completion of the overall project:

September 19, 2006	Council Awards Contract to Retain Project Manager
September 20, 2006	Site Inspection for Requests for Proposal – Architectural Services
September 27, 2006	Request for Proposal – Architectural Services Closes at 3:00 p.m.
October 2-6, 2006	Interview Process for Short-Listed Architectural Firms (maximum of 4)
October 17, 2006	Council Awards Contract to Retain Architectural Services
February, 2007	Council Considers a Report from the Project Implementation Committee (PIC) which Recommends a Preferred Final Design for Nineteen on the Park Complete with Detailed Project Cost Estimates;  Council Authorizes that the Tendering Process Commence;  Council Considers a Report from the PIC which Recommends Terms of Reference for the Board of Management
March/April, 2007	As part of the 2007 Budget Process, Council Considers Capital and Operating Budget Allocation for the Project
April, 2007	Council Considers a Report from the PIC on the Bids to Complete the Project;  Council Awards Tender to Complete the Project
June, 2007	Council Appoints Members of the Community to the Board of Management
Late 2007/Early 2008	Facility Opens

## 10. Enclosed Resource Documents

The following documents are provided with the Request for Proposal as background information designed to assist proponents in understanding the scope and nature of the project:

- Town Council Report of June 20, 2006, titled "Nineteen on the Park: An Alternate Use for 19 Civic Avenue."
- By-law No. 2002-169-DS, being a By-law to designate the Old Town Hall and the Clock Tower as having historic and/or architectural value or interest under the authority of the Ontario heritage Act, R.S.O., 1990;
- Legal survey (prepared by OLS) of the landholding/placement of the existing building at 19 Civic Avenue;
- Digital Image: April 2002, Aerial Photography of Main Street/Memorial Park Area from Park Drive to Market Street

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PROJECT MANAGEMENT SERVICES

SECTION B  
T E R M S   A N D   C O N D I T I O N S

1) **Proposal Submission Process**

- a) Each respondent is asked to submit three (3) copies of all documents requested along with their Proposal on company letterhead, sealed and clearly identified as *Project Management Services*. This sealed envelope should be enclosed in the standard tender envelope supplied by the Town of Whitchurch-Stouffville.

**All Proposals will be received by the Administrative Assistant to the CAO, Town of Whitchurch-Stouffville, 37 Sandiford Drive, 4<sup>th</sup> Floor, Stouffville, Ontario, L4A 7X5, up to 12:00 noon local time on Friday, September 8th, 2006.**

- b) Proposal Documents Must:
- i) Be submitted on company letterhead
  - ii) Include all information requested in the Terms of Reference
  - iii) Include summary of relevant experience
  - iv) Include Form of Submission (at the end of this document)
- c) Late submissions will not be accepted and will be returned unopened.
- d) All Proposals must be legibly signed by an authorized officer of the company.
- e) Respondents will be permitted to withdraw their submission unopened after it has been deposited, if such request is received in writing, by the Clerk prior to the closing date and time specified in this document.

2) **Proposal Acceptance**

- a) The Town of Whitchurch-Stouffville reserves the right to accept or reject

any or all Proposals, to negotiate with the selected respondent(s) and to waive irregularities and omissions, if, in so doing, the best interest of the Town will be served.

- b) Proposals or any part of any Proposal will not necessarily be accepted. The Town is not obligated to award a contract to any bidder pursuant to this Proposal. No liability shall accrue to the Town for its decision in this regard.
- c) Respondents are required to return all mandatory forms and declarations (where applicable) supplied by the Town or their submission may be rejected.
- d) Faxed or electronic submissions will not be accepted.
- e) The Town may, in its sole discretion, request respondents to provide additional information or to clarify their submission.

3) **Clarification and Contact Persons**

Any questions regarding this Request for Proposal shall be directed to Mr. Tom Graham, Director of Leisure Services, at telephone number 905-640-1910, ext. 289, or by e-mail to [tom.graham@townofws.com](mailto:tom.graham@townofws.com)

Any changes, additions or corrections in the scope of this proposal will be in writing as an addendum issued by the Town. No verbal interpretation, clarifications or changes shall modify the terms, conditions or specifications contained in this document.

4) **Proposal Process**

The proposal process will be governed according to the following schedule. Although every attempt will be made to meet all dates, the Town reserves the right to modify any or all dates at its sole discretion:

Release of Request for Proposal	August 31, 2006
Submission Deadline	September 8, 2006
Interviews	September 12, 2006
Projected Council Approval	September 19, 2006

5) **Municipal Freedom of Information and Protection of Privacy Act**

In accordance with the Municipal Freedom of Information and Protection of Privacy Act, 1987, R.S.O. 1990, C.F. 31, this is to advise that the personal information respondents provide is being collected under authority of the Municipal Act and will be used exclusively in the selection process. All submissions become the property of the Town. Respondents are reminded to identify in their submission material, any specific scientific, technical, commercial, proprietary or similar confidential information, the disclosure of which could cause them injury. Complete submissions are not to be identified as confidential. Should you have any questions in this regard, please consult the Town Clerk, Clerk's Department at (905)640-1900.

6) **Confidentiality**

The information contained in the Request for Proposal (RFP), or any information concerning this RFP whether written or oral is the property of the Town of Whitchurch-Stouffville. This information must be treated as confidential and not be issued for any purposes other than defined in the RFP and fulfillment of any subsequent contract. If you do not agree to be bound by these terms, please return this document and all copies. All proposals submitted and information provided by the bidder in response to this RFP shall be considered conditional and shall become the property of the Town of Whitchurch-Stouffville. No proposal or any related material shall be returned or released subsequent to submission.

7) **Reimbursement**

Respondents shall not be reimbursed for their efforts in preparing this proposal nor for any presentations or demonstrations, nor for any documentation or data supplied.

8) **Insurance**

Without restricting the generality of the section on indemnification, the successful respondent shall obtain, maintain, pay for and provide evidence of insurance coverage, taken out with insurance companies to transact business in the Province of Ontario and not otherwise excluded by the Town's Insurance and Risk Manager.

i) *Commercial General Liability Insurance*

Commercial General Liability Insurance shall include as an additional insured, The Corporation of the Town of Whitchurch-Stouffville, with limits of not less than five million dollars (\$5,000,000.00) inclusive per occurrence for bodily and personal injury, death and damage to property including loss of use hereof. The form of this insurance shall in all respects be satisfactory to the Town's Insurance and Risk Manager and shall be maintained continuously from wither the commencement of the services or the signing of this agreement, whichever is sooner. The policies shall be endorsed to provide the Town with not less than 30 days written notice in advance of any cancellation, change or amendment restricting coverage.

ii) *Automobile Liability Insurance*

Automobile Liability Insurance in respect of licensed vehicles shall have limits of not less than five million dollars (\$5,000,000.00) inclusive per occurrence for bodily injury, death and damage to property, in the following forms endorsed to provide the Town with not less than 30 days written notice in advance of any cancellation, change or amendment restricting coverage.

Standard non-owned automobile policy including standard contractual liability endorsement; and

Standard owners automobile policy form providing third party liability and accidental benefits insurance and covering licensed vehicles owned for and operated by or on behalf of the successful bidder.

iii) *Professional Liability Insurance*

The respondent is required to provide evidence of Professional Liability Insurance coverage with a limit of not less than five million (\$5,000,000.00) per occurrence, subject to an annual aggregate of five million dollars (\$5,000,000.00).

\*All of the above insurance is to be outlined by the successful respondent only, on the Town's Standard "Certificate of Insurance" form.

9) **Legislative and Licensing Requirement**

All respondents and submissions must comply with any law, including all legislation and regulations, which may be applicable to the services provided

subsequent to the Request for Proposals.

Please be advised that a condition of the agreement will be a requirement that the successful respondent comply with the applicable laws in Ontario and Canada, including the:

- Occupational Health and Safety Act (Ontario);
- Ontario Human Rights Code and the
- Pay Equity Act (Ontario)

Any agreement that results from the request for proposal will be subject to the laws of the Province of Ontario and Canada.

**10) Potential Conflict of Interest**

In their proposal, respondents shall identify any potential conflicts that they and/or their sub-consultants may have in undertaking this project. Respondents are cautioned that the acceptance of their proposal may preclude them from participating as a proponent in subsequent projects where a conflict of interest may arise.

**\*11. Form of Submission**

**This form is to be completed and submitted along with the Request for Proposal.**

**I/WE, the Undersigned, having examined Request for Proposal WS-RFP-06-27, including the Terms of Reference and the Terms and Conditions, do hereby affirm the acceptance of the requirements of the Request for Proposal.**

**I do certify that the information supplied in this submission to be true and complete in all respects.**

I/WE \_\_\_\_\_,  
(NAME – PRINT) (POSITION)

OF \_\_\_\_\_  
(COMPANY NAME)

DATED AT \_\_\_\_\_ THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2006

\_\_\_\_\_  
AUTHORIZED SIGNATURE PRINT NAME HERE

\_\_\_\_\_  
STREET ADDRESS

\_\_\_\_\_  
CITY PROVINCE POSTAL CODE

\_\_\_\_\_  
TELEPHONE NUMBER FAX NUMBER E-MAIL ADDRESS

Signature in the designated space, by an authorized officer of the Respondent's company affirms acceptance of the Request for Submission requirements set forth in this document, the associated costs (where applicable) attributed to the business arrangement between the Respondent and the Town, and hereby certifies that the information supplied in this submission to be true and complete in all respects.

COMPANY SEAL