



REQUEST FOR PROPOSAL

Public Transportation Implementation Plan

Date Issued: April 16, 2018
Closing Date: May 18, 2018

Charlsey White, MCIP, RPP
Director of Planning
cwhite@county.haliburton.on.ca

TABLE OF CONTENTS

Table of Contents	Page 2-3
Company Contact Information Form	Page 4
Definitions	Page 5

PART A - INSTRUCTIONS TO PROPONENTS

1. Review of RFP Document	Page 6
2. Enquiries	Page 6
3. Solicitation of County Staff and Council Members	Page 6
4. Proposal Submission and Closing Date	Page 6
5. Addenda	Page 7
6. Proposal Withdrawal and Acceptance Period	Page 7
7. Schedule of Project Timelines	Page 7

PART B – GENERAL CONDITIONS FOR PROPONENTS

1. Influence	Page 8
2. No Collusion	Page 8
3. Conflict of Interest	Page 8
4. Disclosure of Proposal Documentation	Page 8
5. Omission	Page 8
6. Funding	Page 8
7. Cost of Proposal	Page 9
8. No Claim	Page 9
9. No Binding Contract	Page 8
10. Negotiations	Page 9
11. Clarification of Proposal	Page 9
12. Confidentiality of County Provided Resources	Page 9
13. Compliance with Laws and Licensing	Page 9
14. Health and Safety Requirements	Page 9
15. Insurance Requirements	Page 10
16. Workplace Safety and Insurance Board	Page 10
17. Indemnification	Page 10

PART C - SCOPE OF PROJECT

- | | | |
|----|----------------------|---------|
| 1. | Project Description | Page 11 |
| 2. | Background | Page 11 |
| 3. | Goals and Objectives | Page 12 |
| 4. | Deliverables | Page 13 |

PART D – EVALUATION CRITERIA

- | | | |
|----|---------------------------|---------|
| 1. | Evaluation Criteria Table | Page 14 |
|----|---------------------------|---------|

PART E – PROPOSAL SUBMISSION REQUIREMENTS

- | | | |
|----|--------------------|---------|
| 1. | Letter of Interest | Page 15 |
| 2. | Detailed Work Plan | Page 15 |
| 3. | Upset Fee Estimate | Page 15 |

APPENDIX A

- | | |
|---|---------|
| County of Haliburton Map – Transit Service Area | Page 16 |
|---|---------|

County of Haliburton

PLANNING DEPARTMENT

BOX 399

MINDEN, ON K0M 2K0

Telephone: (705) 286-1333 Fax: (705) 286-4881

COMPANY INFORMATION

REQUEST FOR PROPOSAL

PUBLIC TRANSPORTATION IMPLEMENTATION PLAN

COMPANY:

Name of Firm or Individual (Hereinafter referred to as the Proponent)

Mailing Address

Telephone Number

Facsimile Number

Name and Position of Person Signing for Firm

Signature

Dated and Seal

H.S.T. Registration Number

**REQUEST FOR PROPOSAL RECEIVED UNTIL 4:00 P.M. LOCAL TIME
FRIDAY MAY 18th, 2018**

DEFINITIONS:

1. **“Agreement”** shall mean any written contract between the County and a Successful Proponent with respect to the services outlined by the Request for Proposal (RFP), and shall be deemed to include the terms and conditions for the provision of the services as set out in this RFP.
2. **“County”** shall mean The Corporation of the County of Haliburton.
3. **“Closing Date”** shall mean the date and time as set out in Section 4 Proposal Submission and Closing Date.
4. **“Consultant”** shall mean the Successful Proponent with whom the County enters into an Agreement.
5. **“Council”** shall mean the Council of the County of Haliburton.
6. **“may” and “should”** used in this RFP denote permissive – not mandatory.
7. **“MFIPPA”** shall mean the Municipal Freedom of Information and Protection of Privacy Act.
8. **“Preferred Proponent”** shall mean the Proponent whose proposal, as determined through an evaluation analysis as described in the RFP, provides the best overall value in meeting the County’s requirements, and is recommended for award.
9. **“Proposal”** shall mean an offer submitted by a Proponent in response to this formal RFP which includes all documents necessary to satisfy the submission requirements of said RFP.
10. **“Proponent”** shall mean a legal entity, being a person, partnership, firm or corporation that submits a proposal in response to a formal Request for Proposal with the intent of undertaking and executing the respective project.
11. **“RFP”** shall mean this Request for Proposal package in its entirety, inclusive of all schedules and addendums that may be issued by the County.
12. **“Services”** shall mean all services and deliverables to be provided by a Consultant.
13. **“Sub-Contractor”** shall mean a legal entity approved by the Owner, undertaking the execution of a part of the project, pursuant to an agreement with the Proponent.
14. **“Successful Proponent”** shall mean the Proponent whose proposal is recommended to Council for award.
15. **“must”, “shall” and “will”** used in the RFP denote imperative/mandatory, meaning proposals not satisfying imperative requirements will be deemed to be non-compliant and will not be considered for contract award.

PART A – INSTRUCTIONS TO PROPONENTS

1. Review of RFP Document

Proponents shall examine the Request for Proposal document in its entirety and report to the Director of Planning and/or designate any errors, omissions or ambiguities.

2. Enquiries

All enquiries and questions shall be in writing, including but not limited to email, and should be directed to the attention of:

Charlsey White, MCIP, RPP
Director of Planning/Deputy CAO
County of Haliburton
11 Newcastle Street
Minden, Ont. K0M 2K0

(705) 286-1333 Ext. 222
cwhite@county.haliburton.on.ca

Such enquiries should be provided no later than five (5) days prior to the Closing Date so that responses can be generated for all Proponents as an addendum.

3. Solicitation of County Staff and Council Members

With the exclusion of the Director of Planning and the Planning Technologist, and except as otherwise specified by the County, Proponents shall not contact, or communicate with any individuals working for or associated with the County in relation to this RFP. Any Proponent which the County determines to be circumventing this process may, in the County's absolute discretion, be disqualified.

4. Proposal Submission and Closing Date

Proponents shall submit their Proposal in a sealed package to the attention of:

Charlsey White, MCIP, RPP
Director of Planning/Deputy CAO
County of Haliburton
11 Newcastle Street
Minden, Ont. K0M 2K0

The package should be clearly identified as "Public Transportation Implementation Plan", and include the Proponent's name and return address. The proposal submission must be received **no later than 4:00 P.M. local time on Friday, May 18, 2018.**

The Proponent shall have complete responsibility for delivery and submission of the completed proposal. The County accepts no responsibility for any loss or delay with regard to Proposals that are delivered to any location other than the location as specified.

5. Addenda

The County may advise Proponents in writing by formal addendum of any additions, deletions or alterations to this RFP or in response to any questions, which shall form part of the RFP. Communication in any other form will not affect or modify the terms of this RFP and should not be considered by any Proponent.

6. Proposal Withdrawal and Acceptance Period

A proposal may be withdrawn at any time prior to the Proposal Closing Date by written request and endorsed by the Proponent.

A Proponent who has withdrawn a proposal may submit a new proposal, but contingent upon the terms of this RFP.

A Proposal may not be withdrawn at or after the proposal closing time and shall remain valid and be open for acceptance by the County, in whole or in part, until sixty (60) days after the proposed closing date, unless an extension is mutually agreed to – in writing.

7. Schedule for Project Timelines

Issuance of Request for Proposal	April 16, 2018
Deadline for Proponent Inquiries	May 11, 2018
Request for Proposal Closing Date	May 18, 2018
Review and Evaluation of Proposals Submitted	May 22-25, 2018
Selection of Preferred Proponent	June 2018
Submission of Deliverables	November 15, 2018

Please Note: The above schedule is subject to change at the discretion of the County of Haliburton.

PART B – GENERAL CONDITIONS FOR PROPONENTS

1. Influence

No person, partnership, firm, company, corporation, or organization shall attempt in any way, directly or indirectly either in private or in public, to influence the outcome of the evaluation or acceptance thereof.

The proposal of any person, company, corporation, or organization found to influence the outcome of any portion of the County purchasing policy process will be disqualified and may be subject to further exclusion.

2. No Collusion

No Proponent may discuss or communicate about, directly or indirectly, the preparation or content of its proposal with any other Proponent or the Agent or Representative of any other Proponent. If the County discovers that there has been a breach at any time, the County reserves the right to disqualify the proposal and/or terminate any ensuing agreement.

3. Conflict of Interest

The Proponent must disclose to the County any potential conflict of interest that might compromise the performances of the services rendered. If such conflict of interest does exist, the County may, at its discretion, refuse to consider the respective proposal.

The Proponent must disclose whether any County employee, member of Council or member of a County agency has a financial interest in the Proponent and the nature of such interest. If such an interest exists or arises, the County may, at its discretion, refuse to consider the proposal or withhold the awarding to the Successful Proponent until the matter is resolved to the County's sole satisfaction.

4. Disclosure of Proposal Documentation

Documentation comprising any proposal submitted in response to the RFP, along with correspondence, documentation and information provided to the County by any Proponent in connection with or arising from the RFP, once received by the County shall become the property of the County. Further, this documentation is subject to the Municipal Freedom of Information and Protection of Privacy Act ("MFIPPA"), and may be released pursuant to this Act.

Proponents are advised to disclose in their submission any scientific, technical, commercial, proprietary or confidential information that could cause them injury. Proposals will be made available to members of Council provided that their requests are in compliance with County policy and may be released to the public pursuant to the MFIPPA.

5. Omission

The County of Haliburton reserves the right in its sole discretion to accept or reject all or part of any submission which is found to be non-compliant with the requirements of this request.

6. Funding

The award of any contract shall be conditional upon available funding as prescribed by the County of Haliburton Planning Department budget and subsequent approval from members of Council.

7. Cost of Proposal

Preparation and submission of a proposal in response to this RFP is voluntary wherein any costs associated with the preparation, submission, meetings, negotiations or discussions with the County are solely that of the Proponent.

8. No Claim

The County will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a proposal, or participating in negotiations for a contract, or other activity related to or arising from this RFP. Except as expressly and specifically permitted in this RFP, no Proponent shall have any claim for compensation of any kind whatsoever, as a result of participating in this RFP, and by submitting a proposal.

9. No Binding Contract

The County may, after reviewing the proposal received, enter into discussions with one or more of the Proponents, without such discussion being construed as binding and/or creating a contract with the County.

10. Negotiations

The County shall have the right to negotiate on such matters as it deems necessary with the Preferred Proponent without obligation to communicate, negotiate, or review in similar fashion with other Proponents. The County shall incur no liability with any other Proponent as a result of such negotiation of alternative arrangements.

11. Clarification of Proposal

The County reserves the right to make requests for additional information with respect to the content of any proposal in order to clarify the understanding of the Proponent's submission. The County may request further information from one or more Proponents, and not necessarily from all others.

12. Confidentiality of County Provided Resources

All correspondence, documentation and information provided by County staff to prospective Proponents in connection with, or arising from this RFP, or the acceptance of any proposal shall remain the property of the County and must be treated as confidential by prospective Proponents. Further, such information must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent agreement.

The Proponent and/or associates shall not release for publication any information with this RFP or any agreement without prior written consent from the County.

13. Compliance with Laws and Licensing

The Successful Proponent will be responsible for adherence to all Federal, Provincial and Municipal statutes, regulations, by-laws, codes of professional conduct and further responsible for all permits and licenses that may be required.

14. Health and Safety Requirements

The Successful Proponent shall perform all work in strict compliance with the Occupational Health and Safety Act of Ontario. The Proponent acknowledges possession of the current OHSA and its applicable regulations.

The Proponent acknowledges its duty as an Employer and a Supervisor under the Occupational Health and Safety Act and under the applicable regulations and in particular, that the Proponent shall take all reasonable measures under the circumstance for the protection of a Worker.

The Proponent shall provide all safety and personal protective equipment as required under the OHSA and Safety Act. The County has the right to stop the work if improper performance or measures are being witnessed.

The Proponent releases and discharges the County from any claim or demand for any action taken by the County to exercise its duties of due diligence under the OHSA.

15. Insurance Requirements

The Successful Proponent shall confirm and maintain in effect, at their expense (including the payment of all deductibles) and for the duration of the services provided, the following policies of insurance, which shall be in a form acceptable to the County. A certificate of these policies must be provided to the County prior to the commencement of the prospective services.

Professional Liability

- for the performance of services by the Proponent providing that the policy is in an amount of not less than two million dollars (\$2,000,000.00), and shall not be construed as a limit of liability in the performance of said services.

Comprehensive General Liability

- providing that the policy is in an amount of not less than two million dollars (\$2,000,000.00) per occurrence, and
- adds the Corporation of the County of Haliburton as an additional insured, and
- has provisions for cross-liability and severability of interest between the Proponent and the County.

16. Workplace Safety and Insurance Board

The Proponent shall be required to provide a Certificate from the Workplace Safety and Insurance Board, prior to the start of the work and at a minimum of every sixty (60) days during the life of the contract – indicating that all of the assessments the Successful Proponent or any affiliate is liable to pay under the Workplace Safety and Insurance Board Act or successor legislation have been paid and they are in good standing with the Board.

17. Indemnification

The Successful Proponent shall indemnify and hold harmless the County, and their respective officers, directors, agents and employees, from and against claims, demands, losses, costs, damages, actions, suits or proceedings by third parties that arise out of, or are attributable to the Proponent's performance of services.

PART C – SCOPE OF WORK

1. Project Description

The County of Haliburton is not currently serviced by a public transportation service. There are a number of transportation services through local agencies/municipalities available within specific locations and/or to a specific segment of the population. The existing services do not meet the current needs of all residents within the County of Haliburton. A County wide public transportation service, provided for all residents and visitors, would have a positive impact on the County through social, economic and environmental benefits.

The Council for the County of Haliburton supports the business case presented by the Transportation Taskforce and has selected a booked shared ride public transportation system to best serve the public. An implementation plan for this service is required for the option selected based on the needs and opportunities (based off of the business case) provided. The implementation plan must clearly outline the public transportation goals and objectives, and provide and outline service options related to this form of transit system, including delivery approaches, costs and required resources. The implementation plan must include a ride prioritization service plan and attainable means to satisfy requirements for specialized transit and AODA consideration. Fare projections, funding opportunities and a financial plan are to be included based on the results of the above listed requirements.

2. Background

Haliburton County is comprised of four lower tier Municipalities: Township of Algonquin Highlands, Municipality of Dysart et al, Municipality of Highlands East and Township of Minden Hills. The current composition sees County Council comprised of eight members; the Mayor and Deputy Mayor of each of the four municipalities. The Warden is elected by County Council each year.

In 2015, County Council partnered with Rural Transportation Options Group and the Community Transportation Partnership for a Province of Ontario pilot grant program to improve community transportation services for seniors, persons living with disabilities, youth, and other members of the community who need transportation. The County of Haliburton was one of only 11 municipalities selected to participate and receive funding.

The Community Transportation Project was funded until March 2017 and, following successful application, the Minister of Transportation provided existing projects an extension of the project for a further year with an offer of up to \$50,000 in additional funding. Again the County of Haliburton and its partners were successful recipients. The Community Transportation Pilot Grant Program for the County of Haliburton was extended until March 31, 2018. The additional funding and time was to allow current funded recipient programs to continue providing better coordinated and more frequent transportation services across their communities.

To date the County of Haliburton and its partners have completed a transportation service marketing and promotion campaign, developed an information and referral service, developed an integrated website, implemented a toll-free phone number, promoted the expansion of a ride share service, and provided a system navigator to aid community members in finding and accessing appropriate transportation options.

In November 2016, more than 70 community stakeholders, leaders and decision-makers from different sectors came together to discuss a plan for addressing transportation in Haliburton County. The day-long Transportation Summit included: an overview of transportation services currently available in Haliburton County, presentations on innovative programs from surrounding or similar regions, a panel discussion on lessons learned, and small group work to determine what actions could be taken within Haliburton County.

Transportation is a multi-sector issue, so participants represented the following sectors: business, economic development & tourism; all 3 levels of government; public, private & not-for-profit transportation operators;

health, social services & housing; education/training, employment & poverty reduction; community organizations; and affected residents.

Three key messages from the guest presenters were:

- 1) Municipalities play an essential role in addressing transportation needs
- 2) Multi-sector collaboration and partnerships are key
- 3) Multi-modal “coordination” of services extends reach, efficiency and effectiveness

The afternoon small group session involved people designing a transportation system for Haliburton County that identified existing assets, additional resources required, and short, medium and long term actions. The information gathered through this exercise included viewpoints from a diverse range of sector representatives (including end users) and is indicative of the elements of a transportation system that will have the greatest support from the community.

From this Transportation Summit the Transportation Taskforce was created to carry the results forward and create a plan comprised of short, medium and long term actions for the implementation of a public transportation system for the County of Haliburton. County Council designated a staff member and a Council representative to join the Transportation Taskforce.

The Transportation Taskforce presented County Council with a Community Transportation Business Case in November 2017. This document provided a summary of multiple options for rural public transportation services. It recommended two options to County Council, which the Transportation Taskforce believed would best meet the needs of local residents and businesses.

Option one was a booked shared ride, which would operate 5 days a week with a potential cost of \$192,000 per year. Option two was a blended service model where a bus is run on a fixed route and a booked shared ride brings riders to the fixed route from outlying areas, operating 5 days a week with a potential cost of \$315,000 per year. The Business Case did not include an implementation plan, only rationale to support rural public transit, transportation options and estimated costs.

County Council reviewed the Business Case presented, and following discussions about transportation systems and services within the County of Haliburton, decided:

- To commission an implementation plan for public transportation services; and
- The public transportation system to be implemented would be the booked shared ride service.

3. Goals and Objectives

To support County Council in the decision making process the implementation plan will provide a current information service review, cost projections, a summary of transportation related funding, implementation processes and other information as outlined related to starting a new public transportation service within the County of Haliburton.

4. Deliverables

The following resources will be provided by the County as online resources available at <https://haliburtoncounty.ca/> :

- **The County of Haliburton Official Plan:** <https://haliburtoncounty.ca/services/planning-and-gis/official-plan/>
- **The County of Haliburton Growth Management Plan:** <https://haliburtoncounty.ca/services/planning-and-gis/growth-management/>
- **The County of Haliburton Housing Study:** <https://haliburtoncounty.ca/services/planning-and-gis/housing-studystrategy/>
- **Age Friendly Master Plan:** <https://haliburtoncounty.ca/public-notice/new-age-friendly-master-plan/>
- **Transportation Taskforce Business Case for Community Transportation:** <https://haliburtoncounty.ca/wp-content/uploads/2016/07/Business-Case-County-of-Haliburton-Community-Transportation.pdf>
- **Evaluation Report: Haliburton County Community Transportation Pilot Project:** <https://haliburtoncounty.ca/wp-content/uploads/2016/07/Evaluation-Report-Haliburton-County-Community-Transportation-Pilot-Project.pdf>
- **The Mapping and Analysis of Transportation Needs in Haliburton County Analytical Report:** <https://haliburtoncounty.ca/wp-content/uploads/2016/07/Mapping-Analysis-of-Transportation-Needs-In-Haliburton-County.pdf>

The detailed Public Transportation Implementation Plan will include, but shall not be limited to:

- Provision of public transit services through the County of Haliburton, with service to all four local municipalities;
- Recommended staff requirements, operational structure, reporting system outline, office/shelter space;
- Review and recommendation of transit vehicle options, including costs, vehicles, ownership vs lease, maintenance, etc.;
- Financial plan, including budget estimates, fares, all revenues and expenditures and funding sources;
- Mapping of coverage areas and route system, which is to be ESRI GIS compatible with appropriate layers as determined by County staff (data sharing agreement required);
- List of all legislative requirements related to provisions of transit services;
- List of County by-laws, policies or other documentation needs to be put in place to initiate a public transit service;
- Transit planning software recommendations, required for booking transit service shared rides;
- A phased implementation plan of all elements listed above; and

- Proposed strategies to monitor the implementation of the plan.

PART D – EVALUATION CRITERIA

1. Evaluation Criteria Table

Proposals will not be based solely on projected study costs. Proposals will be evaluated using a best value approach with consideration for both merit and price. The County will score the proposals on the basis of the categories shown below:

Category 1 – Mandatory Requirements	Rating/Score
Compliant with Mandatory Submission Requirements	Pass/Fail
Category 2 – Proposal Merits	
Proponent Experience <ul style="list-style-type: none"> ○ Experience and involvement of key personnel ○ Demonstrated knowledge of the subject and its complexity ○ Demonstrated performance and experience on similar projects ○ Methodology and approach – confidence and direction 	20
Proponent Approach and Methodology <ul style="list-style-type: none"> ○ Professional presentation – confidence with methodology proposed ○ Presentation relating to confidence that schedule of completion is reasonable ○ Diversity of expertise including Transportation Planning and Rural Planning 	45
Schedule <ul style="list-style-type: none"> ○ Ability to complete the project in the timelines specified ○ Demonstrated confidence that the schedule of completion is attainable 	10
Category 3 – Financial <ul style="list-style-type: none"> ○ Confidence that the costing provided will provide best value to the County of Haliburton 	25
TOTAL	100

If the proposal fails any mandatory requirements, the submission will be rejected.

Lastly, through the action of submitting a proposal the Proponent agrees to the evaluation criteria being implemented by the County.

PART E – PROPOSAL SUBMISSION REQUIREMENTS

The Proponent shall provide a proposal that should include, but is not limited to the following items:

1. Letter of Interest

- An outline of the proposed approach for meeting the County's goals and objectives, and
- A personnel listing of the project staff including the Project Manager, key personnel staff for all phases of the study, detailing experience on similar projects and their specific role for this project, and
- An account of the relevant experience of the Project Manager and key personnel with specific reference to similar projects undertaken and completed successfully for counties or municipalities, and
- The base of operations for this project, and

2. Detailed Work Plan

- An outline describing the main tasks to be undertaken and all subtasks required to execute all aspects of work consistent with the goals and objectives as detailed in PART C – Scope of Work, and
- A graphical project schedule providing the time requirements and date of completion of the study's main tasks, subtasks and activities – including an allotment of time for review by County staff and the Transportation Taskforce membership who meet monthly, and
- A time breakdown and summation of estimated person-hours for each identified task and named member of the Project Team and support staff as required to complete all tasks of the project.

3. Upset Fee Estimate

The upset cost estimate shall be itemized according to the tasks of the work plan, and shall include staff hourly rates, and all fees and disbursements required for completing the work plan assignments. Prices shall not include contingencies and HST. (Administration and/or office charges are considered overhead and shall not be invoiced as disbursements.)

