

April 2024

## **TOWN OF WHITECOURT REQUEST FOR PROPOSALS**

### **OFF-SITE LEVY BYLAW REVIEW**

#### **INTRODUCTION & BACKGROUND**

The Town of Whitecourt, Alberta is a growing, dynamic community of 9,927 residents, with a surrounding population of approximately 4,830 people. Whitecourt is the largest urban centre between Edmonton and Grande Prairie Alberta. The Town is currently in the process of updating its Off-Site Levy Bylaw to meet legislative obligations, and to ensure that there are sufficient funds to sustain the future growth of the community.

The current Off-Site Levy Bylaw No. 1532 was passed in 2017. This bylaw gives the municipality authorization to collect off-site levies (OSL) on new developments at the development permit or subdivision stage to help pay for the capital costs of water, sewer, and transportation infrastructure projects required for growth. The Town of Whitecourt is requesting a review of the projects and project costs, as well as the bylaw itself. This review will ensure that the off-site levy methodology meets current legislation and best practices, and that new developments contribute equitably towards growth. It should reflect current values to charge new developments as they come on-stream while giving consideration to sustain and encourage growth in the community.

#### **SERVICES REQUIRED**

Determine the growth requirements for the next twenty-five years to a population of 12,000 – 15,000 people. Review the proposed water, sewer, and transportation projects to ensure that these projects meet the broad requirements for growth. The consultant will determine the areas that benefit from each project and review whether or not OSL sub basin areas are recommended. The consultant will develop current engineering cost estimates for each project. The primary objective of this work is the adaptation and revision of the current off-site levy bylaw to ensure that it supports a cost recovery model for growth, complies with provincial law, and embodies best practices.

The successful applicant will have a strong understanding of engineering estimates, municipal infrastructure requirements, demographic forecasting and current legislative requirements, regulations and case law related to off-site levies in Alberta.

#### **SCOPE OF WORK**

Consulting services are hereby solicited to provide the following services:

1. A background report to establish and support the cost values for the off-site levy bylaw project list. The background study will become part of the long term capital plan for the Town to guide the planning and management of required infrastructure. The report should discuss all items listed in the scope of work above.
2. Review of water, sewer, and transportation projects required for growth.
3. Provide updated cost estimates for all identified required projects.
4. Review and update all benefitting areas, and provide a recommendation on possible off-site levy sub-basin areas.

5. A review of the Town's current off-site levy theory, projected growth, calculation and collection model, as well as the current off-site levy policy.
6. Provide recommendations to the Town for the off-site levy bylaw and policy revisions. Note that the Town will complete any required revisions to the bylaw and policy and will be responsible for presentation of those documents to Council for adoption.
7. Compile all of the information provided by the Town including any assumptions, projects, costs, etc. as well as the new methodology, calculation and collection model into a background report that will provide the supported documentation for the updated bylaw and policy.
8. Assist with preparation of materials for stakeholder consultation necessary to complete the off-site levy bylaw review. This may include assistance developing presentation materials to show the current model and possible alternatives, as well as materials to show the proposed methodology based upon this review. The Town will provide all advertisements, notifications to stakeholders, and all venue bookings. Please outline the number of stakeholder meetings proposed / recommended as well as the associated costs for the preparation of materials for each meeting.

## **DELIVERABLES**

The Consultant will be responsible for compiling all of the text, calculation and mapping information into visually attractive, easy to read, clear and concise interim and final documents. The final documents shall be submitted to the Town in 4 bound hard copies, separate PDF copies, as well as copies of the Word and Excel documents in an editable format. Any AutoCad, GIS, Excel, or other digital files used to create the report, as well as copies of any raw data / calculation spreadsheets shall also be provided to the Town of Whitecourt on two USB flash drives.

## **INFORMATION AVAILABLE**

The Town of Whitecourt will endeavor to provide whatever background studies it may have in its possession to aid in the off-site levy bylaw review. Copies of the current bylaw, fee schedule, and off-site levy policy will be provided to the consultant as well as identified projects and costs to be included in the new bylaw.

Statutory and non-statutory plans are available on the Town's Website under Business > Construction & Permitting:

<https://www.whitecourt.ca/business/construction-permitting>

Upon request, the Town will provide any legal base plans, maps, servicing studies, utility information, historic land development information, etc. that they have available and that the consulting firm feels is necessary to complete the project.

All documents provided are the property of the Town and shall be used for the sole purposes of this off-site levy bylaw review. The Town does not warrant the accuracy of the information provided. The consultant must use their own judgment when relying on these documents and will be responsible for organizing the data.

## RFP CONTACT

A bidding firm may contact Stephanie Schaffner by email at [stephanieschaffner@whitecourt.ca](mailto:stephanieschaffner@whitecourt.ca) to clarify any matters relating to this request for proposals.

Inquiries must be received by May 15, 2024 and may be recorded and added to the website and/or Alberta Purchasing Connection site. Bidding firms have the responsibility to notify the Town in writing of any ambiguity, divergence, error, omission, oversight, contradiction, or item subject to more than one interpretation in this RFP, as it is discovered, and to request any instruction, decision, or direction required to prepare the Proposal. Concerns about any term or condition of this RFP must be communicated to the Town by the date(s) specified in this RFP.

Questions received after the stated date(s) may not be answered. Verbal responses to any inquiry are not binding on either party.

## SELECTION PROCESS

Solicitation of consultants is through this “Request for Proposals” through general advertising and invitation. All proposals will be reviewed by the Town of Whitecourt with potential interview of short-listed consultants prior to selection and negotiation of a contract.

All consultants must adhere to the instructions in this Request for Proposals on preparing and submitting the proposal. Proposals will be evaluated based on the following criteria and weighting:

### Technical Quality (30%), Expertise (20%), and Experience (30%)

- Past experience and performance on comparable projects.
- Qualifications and experience of principal staff and any proposed affiliated associates.
- Contingency plan, cross training and backup of key staff members.
- List of any subcontractors expected and their role.
- References from at least 3 similar sized or comparable types of projects completed within the previous five years.

### Price (10%)

- Cost may not be the primary factor in the selection of a Consultant.
- Proposed fee structure, including all sub-consultant fees, disbursements, and G.S.T.
- The Town’s budget for the project is \$70,000. Proposals should contain an upset cost for the total project as well as separate upset costs for each of the project components listed in the scope of work and/or alternate options proposed by the Consultant such that the Town may select only those components/options desired.
- Please provide hourly rates for each team member and any additional professional services the Town may require.
- Although the Town anticipates handling all presentations associated with the project, we may ask for the consultant to present on our behalf and/or assist us with the various stakeholder and Council meetings that may be required. Please provide a flat rate fee for presenting at such meetings as may be deemed necessary.
- Proposals must be valid for a period of not less than 90 days from the closing date.

### Timeline (10%)

- Proposed work plan.
- Proposed timelines to complete the project in a timely manner.

## **PROJECT TIMELINES**

It is expected that the contractor will complete the project in a timely manner.

## **PROPOSAL SUBMISSIONS**

Proposals must be received no later than **4:00 pm MST, May 24, 2024**.

Interested Consultants will submit their proposal in **PDF format via email** to Stephanie Schaffner at [stephanieschaffner@whitecourt.ca](mailto:stephanieschaffner@whitecourt.ca). The subject line of the email shall be clearly marked *RFP – Off-Site Levy Bylaw Review*.

Proposals will not be considered if received after the submission deadline or if lacking any predetermined requirements.

**Note that Proposals greater than 5MB will NOT be accepted by the Town of Whitecourt email server. Arrangements for proposal submissions that exceed this file size are to be made with the contact for this RFP and may include delivery to the Town office on a USB and/or alternate secure electronic transmittal (i.e. ftp, dropbox, etc.).**

It is the respondent's responsibility to ensure that it has all the necessary information concerning the intent and requirements of this RFP.

The Town reserves the right to modify specified target dates and to reject any or all submissions (with the lowest proposal not necessarily being accepted) or to cancel or withdraw the RFP for any reason without incurring any cost or liability for costs and damages incurred by a respondent, including, without limitation, any expenses incurred in the preparation of the submission. The Town also reserves the right to request additional information from respondents, to waive any formality or informality in the selection, and to accept the proposal deemed most favorable to the interests of the municipality.

## **FOIP ACT**

### Confidentiality of Request for Proposals:

The access and privacy provisions of the Freedom of Information and Protection of Privacy Act govern all documents submitted to the Town. While this Act allows persons a right of access to records in the Town's custody or control, it also prohibits the Town from disclosing your personal information or confidential business information. This prohibition takes effect if disclosure would be significantly harmful to your business interests or would be an unreasonable invasion of your personal privacy as defined in Sections 15 and 16 of the Act. Applicants are encouraged to identify those portions of their submissions which they are submitting in confidence and which, if revealed, would harm the business interest of the company.

### Rating and Evaluation Records:

Assessment criteria and allocation formulas for this Request for Proposals are public information. Individual assessments of bidders are considered confidential and of interest to

competitors or other bidders under this Request for Proposals. Individual assessment information will be provided, upon request, to the submitter/bidder to whom it relates, and to others, only in accordance with the Freedom of Information and Protection of Privacy Act.

Personal Information about the Provider Employees or Agents:

The purpose of collecting the personal information that must be provided in this Request for Proposals is to enable the Town to ensure the accuracy and reliability of the proposal, and to enable the Town to evaluate your response to this Request for Proposals.

**CLOSING INFORMATION**

1. The Town of Whitecourt is not liable for any costs or expenses or to reimburse or compensate the proponents in any manner whatsoever or under any circumstances including, without limitation, in the event of rejection of all proposals or cancellation of the project.
2. The Town of Whitecourt reserves the right to request that any or all proponents clarify and make revisions to their proposal. The Town may choose to meet with one, several, or all proponents to discuss aspects of their proposal. The Town of Whitecourt is not obligated to seek clarification from any proponent with regard to any aspect of its proposal.
3. The lowest or any proposal will not necessarily be accepted, and the Town is not bound to accept any proposal. Further, the Town reserves the right to accept or reject any proposal in whole or in part, waive any irregularities in the proposal process, and to discuss different or additional items to those included in this RFP, at its sole discretion. The Town may invalidate this RFP and may issue a second RFP at its sole discretion.
4. Proposals received from individuals or legal entities engaged in litigation with the Town of Whitecourt as a party adverse in interest at the time of this RFP will be rejected.
5. The information contained in this RFP is supplied solely as a guideline for the Consultants. While every reasonable attempt has been made to ensure its accuracy, the Town does not guarantee or warrant its accuracy, nor is it necessarily comprehensive.
6. The access and privacy provisions of the Freedom of Information and Protection of Privacy Act govern all documents and information collected by the Town of Whitecourt relating to this Request for Proposals.

**Thank you for your anticipated response.**