



REQUEST FOR PROPOSAL
RFP2018-10

**Local Energy Poverty Research Services for
Smart Cities Challenge**

Issued: October 24, 2018
Closing: Intake 1: Friday November 2, 2018, 3:00PM AST
Intake 2: Friday November 16, 2018, 3:00PM AST
Intake 3: Friday November 30, 2018, 3:00PM AST

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1.0 INTRODUCTION

1.1 OVERVIEW

The Town of Bridgewater is seeking the services of one or more Community Service Organizations to support the implementation of the Energy Poverty Research Program. The Proponent will do so by providing data and information to the Town of Bridgewater related to energy poverty in the community, and by collecting relevant information from clients and local residents. The Energy Poverty Research Program is related to the development of the Town of Bridgewater's Smart Cities Challenge final application.

1.2 BACKGROUND

The Town of Bridgewater has been selected as a finalist in the national Smart Cities Challenge granting program (<https://impact.canada.ca/en/challenges/smart-cities>), making it a contender for a \$5 million innovation grant. The Town's proposal involves the use of data and connected technologies to lift 20% of its population out of energy poverty within 10 years – the current rate of energy poverty is approximately 40% of residents. The proposal builds on the Town's acclaimed Community Energy Investment Plan, which lays out a 30-year plan to transition the community toward a clean and affordable energy economy.

Through a thorough process involving technical research and analysis, and in-depth community consultation and engagement, the Town's goal is to produce a winning Final Application, due March 5, 2019. A Community Engagement Plan has been developed to identify the key stakeholder groups in the community, and to establish the preliminary consultation objectives and schedule for each group. The Plan focuses heavily on two key audiences:

1. Residents of Bridgewater and area who are the primary beneficiaries of the Town's Smart Cities Challenge proposal. Participants are defined as anyone 18 years and older who is currently experiencing energy poverty or has experienced energy poverty in the past and who may or may not have sought assistance to reduce their energy burden.
2. The non-profit / community sector in the Bridgewater area that provides support services and programs to the residents defined above. Organizations comprising this sector are collectively defined as "Community Service Organizations" for the purpose of this RFP, and generally include, but are not limited to, not-for-profit organizations, charitable organizations, institutions, and government agencies such as the Department of Community Services and Public Health. Depending on the situation they could also include private entities such as a long-term care facilities and pharmacies.

In order to bolster its community engagement and consultation effort, the Town has developed the Energy Poverty Research Program, which will deliver important information about the causes, impacts, and solutions that may exist for energy poverty in this community. Developing a better understanding of the needs, life circumstances, and desires of vulnerable and low-income residents of our community is fundamental to the success of the Town's application. In addition, the Town and its partners need to build a shared understanding of the needs, challenges, and capacities of the Community Service Organizations that work with these residents on a daily basis and are fundamentally connected to their well-being. The Energy Poverty Research Program will take place from October 2018 to January 2019.

The Town is seeking the services of one or more Community Service Organizations to support the implementation of the Energy Poverty Research Program by providing data and information to the Town of Bridgewater related to energy poverty in the community, and by collecting relevant information from clients and local residents. The Town proposes that Community Service Organizations identify research participants from among their current and past clients and/or members. The recruitment of participants will depend on how organizations are comfortable with reaching out to their client base.

Information gathered from the Community Service Organizations and their clients will be kept strictly confidential, and control over whether confidential, sensitive, or identifying information is provided to the Town of Bridgewater will be maintained by the Community Service Organizations and their clients. Research methods will be structured to ensure that the identities of clients is protected to the greatest extent possible, unless clients and the Community Service Organization agree to make those identities known for the purpose of providing named quotes, participating in video capture, etc. Participation in the program is completely voluntary. Participation honoraria for clients are available on request.

This research contract is seeking proposals from Community Service Organizations that:

- Are able to contribute meaningfully to one or more of the identified research methods
- Have experience with local energy poverty issues, either directly or through their clients

Submissions will be evaluated by the Town of Bridgewater's Smart Cities Challenge staff team, and research contracts will be awarded through three consecutive submission intakes. Research contracts will be awarded on the condition that proposals are received that are deemed to add value to the Energy Poverty Research Program, and that sufficient funding is available from the Smart Cities Challenge project budget. Not all proposals, or any, may be awarded, at the sole discretion of the Town of Bridgewater. An organization can only be awarded this research contract a maximum of one time.

1.3 OBJECTIVES

The Community Service Organization will provide energy poverty research services to the Town of Bridgewater by participating in one or more of the following Energy Poverty Research Program methods:

Providing data and information from their own organization

- i. Completing a long form survey
- ii. Attending program workshops
- iii. Participating in an in-depth interview

Organizing data and information collection from their clients

- iv. Disseminating surveys and questionnaires
- v. Arranging in-person interviews
- vi. Arranging focus groups

These activities will take place between the award of this contract and January 31, 2019. The Town of Bridgewater may award contracts for this RFQ to multiple successful proponents.

1.4 INQUIRIES

All inquiries about this RFP shall be directed to the individual listed below. Information that is obtained from any other source is not official and may be inaccurate.

Leon de Vreede
Sustainability Planner
Planning & Recreation Department
Town of Bridgewater
60 Pleasant St
Bridgewater, NS B4V 3X9

Email: Leon.deVreede@bridgewater.ca
Phone: (902) 541-4390

SERVICE REQUIREMENTS

1.5 WORK/PROJECT DESCRIPTION (SCOPE)

The Community Service Organization will conduct research services in support of the Energy Poverty Research Program as described and coordinated by the Town of Bridgewater in pursuit of the Smart Cities Challenge. These services will constitute at minimum one of the following:

Providing data and information from the Community Service Organization:

- i. **Completing a long form survey** – appointing one of more staff, directors, volunteers, or other members of the organization to complete a long-form survey that details the organization’s experience with energy poverty issues in the Bridgewater area, and seeks the organization’s recommendations and advice on developing long-term systemic solutions to this problem. The organization will receive the survey from Town of Bridgewater staff, and have approximately 1 month to complete it. The survey will be made available in both an online format, and will consist of multiple choice and short answer questions.
- ii. **Attending program workshops** – appointing one or more staff, directors, volunteers, or other members of the organization to participate in a series of community consultation and design workshops that are being organized by the Town of Bridgewater. Workshops are divided into a number of thematic streams that relate to energy poverty, and are between 2 hours and a full day in length and may be video or audio recorded. A preliminary workshop schedule has been published in the Community Engagement Plan, and an updated schedule is available at any time upon request. The organization does not need to attend all the workshops, but would ideally attend all the workshops in at least one of the thematic streams.
- iii. **Participating in an in-depth interview** - appointing one or more staff, directors, volunteers, or other members of the organization to participate in an in-depth interview that will explore specific areas of the organization’s experience with the challenge of energy poverty. The interview will be between 1-2 hours in length and may be video or audio recorded. It will be scheduled based on the mutual availability of the organization’s representative(s) and the Town of Bridgewater’s interview team. Should a follow-up interview be felt to be necessary, this may be done at the organization’s choosing.

Organizing data and information collection from the Community Service Organization's current and/or past clients:

- iv. **Disseminating surveys and questionnaires** – receiving paper or online copies of survey tools, promoting those tools to clients and/or members, and if necessary facilitating the completion of those tools by clients / members who may need assistance in doing so. Survey tools will consist of multiple choice and short answer questions, and gather information about individual experiences with energy poverty issues as well as solicit feedback to proposed solutions to this problem. No personally-identifying information will be captured through the survey process, though participants may be offered the opportunity to provide quotes or participate in a further in-person interview. Organizations will have approximately 1 month to have the survey tools completed by their clients and/or members. The organization may choose to organize a drop-in style event where participants can fill in surveys with assistance, and be offered child care and/or transportation to support their participation. If there would be room at such events for the clients and/or members from other Community Service Organizations to attend as well, Town of Bridgewater staff will make those opportunities known to others. It is the responsibility of the organization to return paper surveys to Town of Bridgewater staff by the end of the survey timeframe.
- v. **Arranging in-person interviews:** recruiting one or more clients and/or members to participate in an in-depth interview to discuss their lived experience with energy poverty issues in depth, and facilitating the planning of logistics for the interview to take place. The interview will be approximately 1 hour in length and may be video or audio recorded with the interviewee's permission. It will be scheduled based on the mutual availability of the organization's representative(s), the interviewee, and the Town of Bridgewater's interview team.
- vi. **Arranging focus groups:** recruiting one or more clients and/or members to participate in one or more focus to discuss their lived experience with energy poverty issues, and facilitating the planning of logistics for the focus group(s) to take place. The focus group(s) will be approximately 2 hour in length and may be video or audio recorded with the participants' permission. It will be scheduled based on the mutual availability of the organization's representative(s), the participants, and the Town of Bridgewater's interview team.

The Community Service Organization is free to propose which research service(s) it will provide. Consultation with Town of Bridgewater staff is permitted to identify the areas of greatest need in preparation of the organization's proposal.

Honoraria for Interview and Focus Group Participants

The Town of Bridgewater is making available a separate fund for the provision of honoraria for clients and/or members who participate in in-person interviews and focus groups at a rate of \$20 per hour. Those honoraria can be applied for and will be provided separately from this research contract. However, administration and paperwork related to the disbursement of the honoraria can be considered part of the organization’s efforts under sections (v) and (vi) of the Scope of Work above.

Note that participation in this research contract is not a requirement to access those honoraria, and use of the honoraria is not a requirement to participate in this research contract. Please see the Energy Poverty Research Program document for more information on the honoraria program.

Reporting

The Community Service Organization will report to the Sustainability Planner and designated members of the Smart Cities Challenge staff team in the delivery of this work.

1.6 SCHEDULE OF EVENTS

The following shall be the proposed timeline for this project. Dates may be subject to change based on circumstances:

EVENT	Date
1. RFP Distribution to Community Service Organizations	Wednesday October 24, 2018
2. Proposal due date – Intake 1	Friday November 2, 2018
3. Proposal due date – Intake 2	Friday November 16, 2018
4. Proposal due date – Intake 3	Friday November 30, 2018
5. Target date for review of proposals	Within 5 business days after each due date

1.7 DELIVERABLES/MILESTONES

The requirements in this section will prevail as enduring requirements for service delivery throughout the effective period of any contract(s) resulting from this RFP.

The Community Service Organization will deliver their research deliverables to the Town of Bridgewater using the following means and by the following deadlines:

Research Deliverable	Delivery Method	Delivery Deadline
i. Community Service Organization: Long Form Survey	Completed online OR paper copy delivered to Town of Bridgewater staff	November 30, 2018*
ii. Community Service Organization: Workshops	Organization representative(s) attending workshops	January 31, 2019*
iii. Community Service Organization: In-Depth Interview	Organization representative(s) participating in interview	December 31, 2018*
iv. Clients: surveys and questionnaires	Completed online OR paper copies delivered to Town of Bridgewater staff	December 15, 2018*
v. Clients: In-Person Interviews	Client(s) participating in interview(s)	December 15, 2018*
vi. Clients: Focus Groups	Client(s) participating in focus group(s)	December 15, 2018*

** unless notice of extension of deadline is given in writing by Town of Bridgewater staff.*

2.0 ADMINISTRATIVE & LEGAL REQUIREMENTS

2.1 PROPOSER DECLARES

- a. That this proposal is made without collusion or fraud.
- b. That he/she has carefully examined the Contract Documents and taken all the information provided into consideration in preparation of his/her proposal.

2.2 PROPOSER AGREES

- a. To enter into a contract to provide energy poverty research services in support of the Town of Bridgewater Smart Cities Challenge, as described and specified herein
- b. That the total proposed price shall be the price given in page 16 hereunder.
- c. That the proposal is valid for acceptance for 60 days from the time of proposal closing
- d. That payment for items awarded by the Town of Bridgewater, listed in page 16 be paid by the Town of Bridgewater within 30 days of invoice receipt by the Town of Bridgewater.
- e. That by this Request for Proposal, the Town of Bridgewater does not imply that any proposal will be accepted, or that the lowest priced proposal will be accepted. All received proposals will be reviewed as to their compliance with the requirements of this RFP.

2.3 INDEMNITY

The Successful Proponent shall indemnify and hold harmless the Town of Bridgewater, its officers, members of municipal council, employees and volunteers from and against any

liabilities, claims, expenses, demands, loss, cost, damages, actions, suits or other proceedings made, sustained, brought, prosecuted or threatened to brought or prosecuted that are based upon, occasioned by or attributed to any bodily injury to or death of a person or damage to or loss of property caused by any negligent act or omission on the part of the successful proponent, its officers, employees, students, agents or volunteers arising out of this agreement.

2.4 LIABILITY OF ERRORS

While the Town of Bridgewater has made considerable effort to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by the Town, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve proponents from forming their own opinions and conclusions with respect to matters addressed in this Request for Proposal.

2.5 BILLING and PAYMENT

The Proponent shall submit a detailed invoice for services provided to the Town of Bridgewater to the following address:

Town of Bridgewater
60 Pleasant Street
Bridgewater, NS B4V 3X9
Attn: Accounts Payable

A proper invoice from the Proponent shall be submitted and must include the RFP number. Normal payment terms for the Town of Bridgewater are 30 days from receipt of invoice.

2.6 CONTRACT AGREEMENT

The selected Proponent will be required to enter into a contract agreement with the Town of Bridgewater.

The Town of Bridgewater reserves the right to amend the services of the contract at its discretion with 30 days written notice.

2.7 TERMINATION

- a. **Termination for Convenience:** The Town of Bridgewater may terminate a contract, in whole or in part, if determined that such a termination is in its best interest, without showing cause, upon giving written notice to the Proponent. The Town of Bridgewater shall pay all reasonable costs incurred by the Proponent up to the date of termination. However, in no event shall the Proponent be paid an amount which exceeds the bid price for the work performed. The Proponent shall not be reimbursed for any profits which may have been anticipated but which have not been earned up to the date of termination.
- b. **Termination for Default:** When the Proponent has not performed or has unsatisfactorily performed the contract; the Town of Bridgewater may terminate the contract for default. Upon termination for default, payment will be withheld at the discretion of the Town of Bridgewater. Failure on the part of the Proponent to fulfill the contractual obligations shall be considered just cause for termination of the contract. The Proponent will be paid for work satisfactorily performed prior to termination, less any excess costs incurred by the Town of Bridgewater in re-procuring and completing the work.

2.8 CONFIDENTIALITY NOTICE

The selected Proponent agrees not to release or in any way cause to release any confidential information that pertains to the Town of Bridgewater unless they have been specifically approved to do so in writing.

2.9 STANDARD TERMS & CONDITIONS

This RFP is subject to the Town's Standard Terms & Conditions – Goods and Services, <http://www.bridgewater.ca/document-library/tenders-rfps-ads/904-standard-terms-conditions/file> and the Town's Purchasing & Tendering Policy <https://www.bridgewater.ca/town-council/town-by-laws-and-policies/policies/1069-policy-79-purchasing-tendering/file>.

3.0 OTHER IMPORTANT PROVISIONS

3.1 ADDENDA AND ADDENDA ACKNOWLEDGEMENT

Responding to this RFP **may** require the acknowledgement of a specific addendum or multiple addenda as part of the submission. Acknowledgement requirements, whether optional or mandatory, will be specified in the applicable addendum. The proponent must monitor the

Procurement Services website for any addenda that may be issued during the open period of the RFP.

Proponents are responsible to ensure that they are aware of and have complied with any addenda issued in respect of this RFP, by visiting the Procurement Services Web site at <https://www.novascotia.ca/tenders>.

3.2 PUBLIC OPENING

The opening of Proposals will be open to the Public.

3.3 CONSTRAINTS

Limitations Due To Funding Source

Funding for this project has been made available by Infrastructure and Communities Canada. As a result, the Town is required to confirm that all contractors completing work for this project comply with the following provisions imposed by Infrastructure and Communities Canada:

1. That neither the Proponent nor any sub-contractors retained by the Proponent for the purpose or rendering services related to this contract are registered as lobbyists under the Federal Lobbying Act;
2. That through its participation in this contract, the Proponent will not be providing direct benefit to any current or former public servant or public office holder of the Government of Canada, and that the Proponent will promptly inform the Town of Bridgewater should any such conflict of interest situation arise during the course of this work;
3. That any work that the Proponent produces for the Town of Bridgewater under this contract will be the intellectual property of the Town of Bridgewater, and that the Proponent acknowledges that the Town of Bridgewater will grant the Government of Canada a free of charge, non-exclusive, royalty-free, perpetual, worldwide and irrevocable license to collect, retain, use, reproduce, communicate, modify, disclose, translate, publish, and distribute internally or externally, in whole or in part, the Final Proposal and any other information provided by the Town of Bridgewater for promotional, informational and reporting purposes, in relation to the Smart Cities Challenge program.

Media Release

The Proponent must be aware that video and audio recording and photography may take place during community consultation and engagement events, for the purpose of producing project communications materials that may also be shared with the Government of Canada. The Proponent will be advised if and when such recording and photography is taking place, and will be offered an opportunity to provide or withhold their consent to being recorded. Media releases for this project are being coordinated by Picnic Studios.

Personal Information International Disclosure Protection

The *'Personal Information International Disclosure Protection Act' of Nova Scotia* (PIIDPA), creates obligations for the Town of Bridgewater and its service providers when personal information is collected or used and disclosure of personal information. Provisions related to PIIDPA requirements are included in the contract terms. A copy of the Act is available online at: <http://nslegislature.ca/legc/statutes/persinfo.htm>

3.4 CONFLICT OF INTEREST

The Town reserves the right to disqualify any proponent that in the Town's sole opinion has an actual or potential conflict of interest or an unfair advantage in respect of this RFP, whether existing now or is likely to arise in the future, or may permit any such proponent to continue and impose such terms and conditions on that proponent, as the Town in its sole discretion may require.

Proponents are required to disclose, to the RFP Contacts, any potential or perceived conflict of interest issues immediately upon becoming aware of any such conflict.

4.0 SUBMISSION INFORMATION

To help ensure consistency in proponent responses and facilitate the evaluation process, the Proponent should complete and submit the Research Proposal Worksheet contained in Section 6.0 (page 15) of this RFP. A fillable digital version is available upon request.

4.1 SUBMISSION INFORMATION

a. There are three intakes for proposal submission:

- 1) **3:00 p.m. local time Friday, November 2, 2018**
- 2) **3:00 p.m. local time Friday, November 16, 2018**
- 3) **3:00 p.m. local time Friday, November 30, 2018**

b. Proposals are to be submitted in one of the following methods:

- 1) By email to Leon.deVreede@bridgewater.ca. Proposals submitted by email must request a read receipt to confirm that the email has been received.
- 2) By hard copy mailed or delivered to:

Leon de Vreede
Sustainability Planner
Town of Bridgewater
60 Pleasant Street
Bridgewater, NS B4V 3X9

c. Proposals received after 3:00 p.m. on November 30, 2018 shall not be accepted by the Town and will be returned unopened to the proponent.

d. Proposals may be amended or withdrawn by post, courier, or email, if the amendment or notice of withdrawal is received prior to closing. Amendments or withdrawals must be clearly identified as such.

5.0 PROPOSAL EVALUATION CRITERIA

The Town of Bridgewater shall review and evaluate all proposals. Evaluation will be based on the proposals as submitted. When evaluating proposals, the weighting of the aforementioned criteria shall be as follows:

Criterion	Weight (points)	Minimum Requirement
Organization fits the definition of a “Community Service Organization” as defined in this RFP	N/A	Required
Organization is able to contribute meaningfully to one or more of the identified Energy Poverty Research Program Deliverables	10	At least 1 deliverable selected
Organization has experience and familiarity with local energy poverty issues, either directly or through its clients	10	Some relevant experience or familiarity
Organization has proposed a reasonable cost allocation that is connected to its deliverables	10	N/A
Maximum Score Possible	30	

6.0 RESEARCH PROPOSAL WORKSHEET

1. Which Energy Poverty Research Program Deliverables is your organization proposing to deliver?
(please check as many as apply)

- Community Service Organization: Long Form Survey
- Community Service Organization: Participation in Workshops
- Community Service Organization: In-Depth Interview

If you checked any of the above boxes, please describe your organization's experience and familiarity with energy poverty issues in the Bridgewater area:

- Clients: Surveys and Questionnaires
- Clients: In-Person Interviews
- Clients: Focus Groups

If you checked any of the above boxes, please describe your organization's ability to connect with clients who have experienced energy poverty:

2. Please indicate the cost of these services, up to a maximum limit of \$1000:

<u>ITEM</u>	<u>PRICE</u>
1. Staff / Salaried / Administrative Time	\$_____ CAD
2. Transportation	\$_____ CAD
3. Meeting Space	\$_____ CAD
4. Child Care / Day Care / Supervision	\$_____ CAD
5. Materials / Equipment	\$_____ CAD
6. Other (please describe)	\$_____ CAD
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Total (maximum \$1000)	\$_____ CAD

Note: the Town of Bridgewater is making available a separate fund for the provision of honoraria for Clients who participate in in-person interviews and focus groups at a rate of \$20 per hour. Those honoraria should not be included in the above costs. Please see the Energy Poverty Research Program document for more information.

Please indicate whether the Town will be charged HST on the above costs when the invoice is submitted (check one box):

- Yes, HST will be claimed (HST # must be included on invoice submission)
- No, HST will not be claimed

3. Please provide an explanation for the cost allocation described in question 2, including how proposed costs are connected to your proposed Deliverables:

Name of Organization Proposing

Telephone

Address

Signature – Name and Title Printed

Signature – Name and Title Printed

Dated this _____ day of _____ 2018.