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REPORT

Community Energy Plan –
Development of a Request for
Proposal Template

HALIFAX REGIONAL MUNICIPALITY

PROJECT NO. 1009416

**Jacques
Whitford**

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SECTION 1



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Project No. 1009416

April 25, 2006

Cathie O'Toole, Manager
Environmental Performance
Halifax Regional Municipality
Sustainable Environment Management Office
2nd Floor Alderney Gate
40 Alderney Drive
Dartmouth, NS B2Y 2N5

Dear Ms. O'Toole:

**Re: Community Energy Plan – Development of a Request
For Proposal Template**

Jacques Whitford was contracted by Halifax Regional Municipality (HRM) to develop a standardized Request for Proposal (RFP) template for HRM and other Canadian municipalities seeking to develop a Community Energy Plan (CEP). HRM was selected for the template proposal given its mix of urban, suburban and rural areas. The CEP RFP template will address this population distribution and development mix. Jacques Whitford Limited is pleased to provide the following report describing our findings, analysis, and conclusions in the development of a CEP RFP Template for HRM.

Background

Various Canadian municipalities are currently in the process of developing CEPs. There is a wide range of approaches to CEPs given that municipalities in general are at different stages with respect to their overall understanding of sustainability issues, their planning capacities, and their specific energy issues. In most cases CEPs are being created as stand-alone documents, separate from overall sustainability plans, and for fairly homogeneous communities. In most communities, various pieces of the CEP are put together as separate projects- for example, a municipality might issue three different studies: one to determine an energy baseline, a second to focus on renewable energy potential, and a third to look at land-use planning issues and their energy implications. HRM is somewhat of an exception in that it is approaching the CEP in a more holistic fashion, issuing a single study to cover multiple issues of supply, demand and use of energy, and addressing the needs of a diverse municipality. In doing so, the consultants working with HRM will have to form partnerships or acquire expertise to address a wider range of topics than typically required for such a study. Additionally HRM already has in place several long term plans and initiatives on sustainability, as well as a Regional Plan with sustainability as a dominant theme, which have to be fully understood and integrated by the consultant such that the CEP falls inline with existing initiatives.

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The present study produces an RFP Template for HRM and for other municipalities that may wish to take a holistic approach to CEP, or to utilize pieces of the RFP template according to their own needs. The study is funded by Natural Resources Canada (NRCan). A principal funding agency for sustainable development, NRCan shifted its focus a few years ago to encourage sustainable development and is the leading federal department responsible for energy related matters. This department has four primary objectives: undertaking scientific and technological research and development that will promote efforts to use Canada's resources in a more efficient manner, act as a clearing house and repository of resource information so that it is available to all Canadians, assist in framing policy and regulations that support the contribution of Canada's resources to its growth and prosperity while ensuring protection of the environment, health and safety and promoting Canada's interests internationally.

This report addresses the 11 items listed in the work scope section of the RFP received from HRM which is provided as Attachment 1. Please refer to the work scope section in the "Community Energy Plan RFP Template" for the 11 discussion points.

1. Review of Approaches by Other Municipalities

In researching the approaches employed by other Canadian municipalities to undertake community energy plans, Jacques Whitford performed information searches on the internet, contacted multiple municipalities, and communicated with consulting firms who specialize in CEPs. Through these avenues, Jacques Whitford was able to acquire numerous relevant documents. Municipal CEP RFPs, bid documents, options reports, and baseline studies were among the primary sources from which the deliverable was developed.

The municipalities from whom we acquired documents included Kamloops, Whistler, Victoria, Golden, Quesnel, North Vancouver, Bowen Island, and Nanaimo, BC, as well as Yellowknife, NWT, Banff and Canmore, AB, and Hamilton On. CEP plans for some regions in the United States were also examined including communities in California, Oregon, Washington State and Illinois. Consulting firms who specialize in providing CEP services with whom we had discussions included the Pembina Institute and Sheltair. Discussions were also held with Ken Church of Natural Resources Canada and Laura Porcher, of the BC CEA.

A sub-group of the federally funded Federation of Canadian Municipalities includes 'Partners for Climate Protection'. This group is a leader in CEP framework, offering the 5 Milestone Framework which is the most commonly mirrored approach, based on our findings. This government agency also serves as a funding source for environmental initiatives, and has aided numerous Canadian municipalities in their CEP efforts. Their CEPs function on the baseline of greenhouse gas reduction targets, therefore, in conjunction with the national GHG strategy.

The Community Energy Association is a BC organization which serves as an advisory board to the BC Energy Council. It also provides in-depth information and 'how-to' documentation to prepare CEPs. The BC government is encouraging the integration of CEPs into local government strategies and official community plans. British Columbia is leading the way in municipal CEP development from a national perspective.

The California Energy Commission is a state agency which has developed, and provides to the public, a community energy planning guide. This is a detailed document designed to take a community or region through the entire process. It is a prescriptive document which has a different approach to the Canadian model.

The primary result of our research is that the large majority of CEP completed to date in North America are primarily focused on energy and green house gas emission reduction. The CEP's are written with that focus. The Whistler, BC CEP is an example of a broader based CEP which included reviews of present and future energy supply and goals of becoming completely energy self sufficient.

The RFP's received from municipalities were documents ranging in size from 12 to 30 plus pages. The common theme in all of the RFP's was that the actual scope of work was brief, usually less than one page. The majority of the RFP documents included contractual terms of reference and legal requirements for the successful bidder to meet. The focus, similar to the CEP's resulting from the requests, was to measure GHG emissions and energy consumption and define goals to reduce them. They can be described as more of a what but not of a how. Also lacking in the terms of reference were methods or ways to make the CEP an integrated part of the community planning and development model. A summary of the of the contacts made and comments collected is included in Table 1 attached.

It was obvious from our review and from discussions with HRM that the RFP template to be developed would have to far more reaching and more completely defined so that the successful consultant would know what is required and that HRM and other municipalities would receive a CEP that addressed not only what needs to be done but also how and for how long.

2. Requirements for Sustainability Planning in Canada and Nova Scotia

Sustainable planning at the municipal level is not a regulated practice in Canada or within NS at this time. However, the new Gas Tax Agreements (see below) do require the creation of Integrated Community Sustainability Plans, of which CEPs may be a major component, within 5 years. A number of guidelines are currently under development through certain government, private and non-for-profit agencies, which outline areas of focus and offer a framework for municipalities on planning for sustainable development. Web pages were the primary sources for gathering information on this topic, as were discussion with Service Nova Scotia and Municipal Relations, and Infrastructure Canada. It is important to note that an Integrated Community

Sustainability Plan is not strictly a CEP, but that the latter can be a major component of the former. Currently, while governments including the Province of NS are likely to enforce requirements on creating Integrated Community Sustainability Plans, there was no discussion on the specific requirement of a CEP in these plans.

Some high level sustainability frameworks have been popular in Canada, including The Natural Step Framework, the Triple Bottom Line, and Melbourne Principles. These frameworks offer a definition of sustainability against which individual decisions can be weighted, but they do not specifically offer planning direction. National organizations such as Sustainable Communities Indicator Program (SCIP), and Canadian Mortgage and Housing Corporation (CMHC) have offered some more specific measures for charting and monitoring the path to sustainability, though they remain fairly general. There are also movements and schools of thought within the planning profession that require sustainability as a key concept. These include Smart Growth and New Urbanism which focus on settlement patterns, design of neighbourhoods, and transportation; all of which have ramifications for energy.

Under the New Deal for Cities and Community and specifically the Gas Tax Agreement, municipalities have been required to develop Integrated Community Sustainability Plans, but there is currently little guidance on what these Plans would look like. The Alberta Urban Municipalities Association has hosted discussions on defining the requirements for Integrated Community Sustainability Plans, and The Natural Step has been contracted to develop suggestions on such requirements. The Gas Tax Agreement with Nova Scotia defines requirements for Integrated Community Sustainability Plans at this general level:

- build on and enhance existing planning instruments
- integrate economic, environment, social and cultural sustainability objectives;
- be reasonably consistent with statements of provincial interest;
- be prepared with public participation;
- maximize the benefits of any infrastructure; and
- collaboration with other Municipalities
- Much more discussion on final form

More specifically to energy issues within a sustainability planning framework, a Community Energy Association has formed in BC which served as an advisory board to the BC Energy Council. It now provides in-depth information and 'how-to' documentation with respect to CEPs. The BC government is encouraging the integration of CEPs into local government strategies and official community plans. As noted in point 1, British Columbia is leading the way in municipal CEP development from a national perspective.

As mentioned previously, NRCan is also providing considerable support for some aspects of CEP development and/or implementation. Funding from NRCan supports programs such as reducing energy consumption in facilities, industry and transportation, developing new technologies such as fuel cell development and alternative fuels, infrastructure programs including geothermal energy storage, and providing expertise and funding to communities for the development of Community Energy Plans. Much of this funding is under review and a new strategy and funding program for greenhouse gas reduction and sustainability will be developed over the next year.

Finally, the Federation of Canadian Municipalities has been a leader in CEP discussion through the 'Partners for Climate Protection' program over the past decade. Focusing on Climate Change, the FCM program offers a 5 Milestone Framework which is the most commonly mirrored approach, based on our findings. FCM also serves as a funding source for environmental and planning initiatives, and has aided numerous Canadian municipalities in their CEP efforts.

Given the review of literature, there is no one set of requirements that a consultant needs to identify as the basis of the CEP development. However, consultants should be aware of the possibilities and make a compelling argument if they are going to use a sustainability planning framework.

3. Prioritize the Issues Included in the Community Energy Plan

A review of the HRM draft Regional Plan clearly identifies many priority issues that have implications for CEP and for energy in general. These include settlement, transportation, infrastructure, building efficiency and design, utilities, environmental protection, energy security, and development of clean and renewable energies. In light of the review of other jurisdictions, it appears that the issues that HRM faces are not unique or fundamentally different from those faced by other municipalities across the country. That being said, HRM likely has a larger variety of pressing issues and priorities than most municipalities due to its unique urban/suburban/rural nature. Issues like public transit seem to be much more relevant in urban areas, whereas energy efficient service delivery may be much more of an issue in rural areas. Social and economic impacts of energy decisions must be considered by all consultants developing a CEP. A sustainability framework would typically address this issue by attempting to integrate environmental, social and economic viewpoints.

4. Identify Authority Levels and Minimum Required Stakeholders

Stakeholders identified as being necessary in a CEP development process are outlined in Section 4-6 of the deliverable. The municipality has a fairly large role in and authority over energy issues through areas such as transportation, infrastructure investment, land use planning, and building requirements to some extent. Zoning and bylaws set by a municipality can determine the extent to which new forms of energy can flourish and efficient ways of energy use can be developed. Other services such as energy

production and distribution do not fall under municipal jurisdiction. In the case of HRM, Nova Scotia Power and the NS Department of Energy are two of the most important stakeholders with respect to their role in the provision and distribution of energy. It is for this reason that a municipality must work in collaboration with major stakeholders, such as energy providers, but also to exercise its own role in changing the energy future of the community. HRM is seen as a powerful stakeholder in the province, and therefore might have some indirect influence over larger energy issues through lobbying the above mentioned stakeholders to move toward the goals of the CEP. Clearly consultants wishing to create CEPs must understand the levels of authority involved and be effective in engaging primary stakeholders in the discussion.

While there are key external stakeholders that need to be consulted in the CEP process, there are also various internal stakeholders within municipal operations who would be involved. Due to the multi-disciplinary nature of the study it is recommended that HRM and other large municipalities consider assigning a team of Project Managers (two to four members) to supervise the creation of the CEP and to liaise with the consultants - with a lead project officer. The municipal project management team can consist of staff from such departments as Environmental Management Services, Public Works and Utilities, Planning and Development, and Economic Development. This would insure a collaborative effort within the municipality and buy-in into the CEP by various internal stakeholders, which in turn strengthens the outcome and the implementation phase.

5. Define the Planning Process to Deliver the CEP

The overall planning process, including the interactions with both the public and decision-makers differs from community to community. However, the set of best practices below are recommended for a successful CEP planning process:

- i. Establish an internal project management team consisting of staff from relevant departments with a champion or lead responsible officer
- ii. Establish a local steering committee consisting of councillors, citizens, NGOs etc., if not already in existence
- iii. Identify community goals and objectives in creating a CEP
- iv. Identify existing background documents and related plans
- v. Decide whether the CEP will be accomplished through one study, or a series of studies
- vi. Customize and issue the RFP
- vii. Award the project based on criteria included in the RFP template and establish regular contact between the municipal project management team and consultants
- viii. Arrange for presentations by staff and consultants to the steering communities and other stakeholders
- ix. Keep regular contact with the steering committee and the public at large through information sessions, memos, articles, media presentations etc.
- x. Receive and review consultants report

- xi. Run final report by steering committee and then by Council
- xii. Conduct proper public consultation on the CEP according to Provincial requirements before the CEP is adopted by Council.
- xiii. Monitor Implementation

The creation of the CEP by the consultant follows a set of more specific steps as described by the Scope of Work in the RFP template. These typically consist of a baseline study, an analysis of trends and predictable changes, the setting of a vision and end goals, and defining the path to get there. In order to effectively set an energy reduction target (a vision and a goal), which is essentially required for a CEP, one must go beyond the conventional projects of population and consider a host of other factors, as outlined in section 4-3 of the deliverable. It is in this section that a consultant must consider, for example, the effects of projected climate change on land use, energy demands, and alternative energy sources. Impacts of immigration and the life-style choices associated with that might also be an issue. Knowledge and innovation on the part of the consultant are very important aspects in considering future circumstances of a city, and crucial factors for the municipality to examine in the contract-awarding process.

6. Identify the Public Consultation Process

Experiences in other jurisdictions, and requirements of sustainability planning suggest that engaging stakeholders early in the process and throughout is important for a successful CEP. Identifying an appropriate public consultation process is identified as a priority for consultants wishing to engage in CEP development, as addressed in Section 4-6 of the deliverable. However, specifics on the design and mode of implementation are particulars that should be determined in conjunction with a municipality's standard public consultation procedures. Consultants may have different methods of engaging different stakeholders depending on their own relationship with them and their organizations strengths. Consultation may be through interviews, focus groups, public presentations, written correspondence or a variety of other methods. Consultants should be required to conduct at least one presentation to the steering committee, and one public presentation to other interested stakeholder and the public at large. The municipality may also ask the consultants to commit to presenting the final result to Council along with municipal staff.

7. Define the Form of the CEP Deliverables

Generally, deliverables of CEP's done in Canada have included one to five documents. These have included an assessment of current GHG emissions and energy consumption, assessment of transportation systems and areas for improvement/increased usage, opportunities for alternative energy production, assessment of planning strategies and energy reduction targets or goals.

It is our view that this list of deliverables falls short of the necessary requirements. For a CEP to be effective the following items are required at a minimum:

- i. There should be an overall assessment of what the community is and how it wishes to grow and develop.
- ii. There should be an assessment of the community energy consumption and where that energy is supplied from and where it is used.
- iii. An inventory of renewable energy supply opportunities for increased development of renewable energy and a description of how that can be supported should be developed.
- iv. An assessment of the method by which the municipality will coordinate its efforts with provincial and federal areas of jurisdiction such as education and health should be developed.
- v. An assessment of the method by which the municipality would alter its planning and development process should be developed. This may include review of federal and provincial building codes and enacting stricter energy requirements. An example is found in some European jurisdictions where building permits are issued only when the energy performance of a structure is established and meets specific criteria
- vi. An assessment of the method by which municipality will establish its energy security and ensure continued delivery of municipal services should be developed.
- vii. The strategy to incorporate the CEP in the regular ongoing business decision making process of the municipality is required. This will include establishing authority for the CEP, reporting requirements, and measurements for success

8. Timeframe Recommendations

The time frame for a CEP is of the order of 100 years as stated in the first section of the scope of work of the RFP. It has the longest horizon of any plan used by a community, eclipsing standard municipal items such as development and budget plans. The RFP requests suggestions on how the CEP should be incorporated into the ongoing work and overall planning and development of the municipality. Suggestions from the public consultation process and discussions with municipal officials and others will lead to the implementation strategy. The consultants will be required to examine successes and failures at other communities in implementing their CEP and making it part of their ongoing overall planning process. It was evident from discussions that a CEP failure was usually due to the champion of the Plan no longer being involved in municipal affairs, whether as a councillor or municipal employee. It is anticipated that the RFP will result in recommendations on how the Plan will become part of a municipality's regular course of business. Benchmarks should be established and annual reports to Council required to determine the progress made on the Plan.

9. Barriers to Energy projects and Roles of Utilities and Government

Discussion of anticipated barriers to overcome in implementation of a CEP is outlined in Section 4-11 of the deliverable. While a municipality has significant powers with respect to some aspects of development (land-use, transportation, zoning etc) there are aspects of the CEP that fall outside of the municipal jurisdiction. In particular, energy generation and distribution may fall within the authority of private utility providers, as well as senior levels of government (NS Power and Department of Energy in the case of HRM). However, the Municipal Government Act does not grant municipalities the right to establish electrical utilities to generate/distribute electricity. This can be seen as a barrier to development of renewable energies, distributed energy production, and district energy system directly and independently by the municipality. Partnerships and collaborative programs need to be introduced. It is important for consultants wishing to work on a CEP to demonstrate an understanding of these divisions of power.

Another barrier is access to funds as renewable or small scale projects typically have long payback periods compared with the present day models of energy delivery.

It is important for consultants wishing to work on a CEP to demonstrate an understanding of these divisions of power.

10. Scoring Methods for the RFP

In most cases it is virtually impossible to write precise, professional performance specifications for an RFP (for any given municipality) when the required outcome of the work is developed through the course of the project. This makes it virtually impossible to quantify design and planning services in the same manner as a commodity. Architecture, engineering, and planning, services are best procured on the basis of relevant technical competence, managerial ability, experience on similar projects, commitment of resources to the project, proven performance, location and/or local knowledge, professional independence and integrity. Therefore, it is standard practice to score proposals with a split between Technical/Managerial capabilities (Part A) and Fee Proposal (Part B).

In this process there should be a clear determination as to the best technical submission for the project. There is an obligation on the part of the procurement agency to facilitate the actual scoring of Part A of the submissions by the reviewers in a consistent fashion. There also has to be sufficient clarity and flexibility for the scorers of Part A of the proposal to allow differentiation of the components within the proposals to produce a valid range of scores. Where this does not occur in the evaluation of Part A, the Technical/Managerial scores can group together and the selection becomes essentially on price which is not desirable.

As suggested breakdown of the factors making up the Technical/Managerial portion of the proposal is as follows:

Consultant Project Qualifications	Technical/Managerial Score	
Technical (50%)		
Relevant Technical Competence (Team)	15	50
Methodology	15	
Experience on Similar Projects	15	
Commitment of Resources to the Project	5	
Managerial (40%)		
Management Competence	20	40
Proven Performance Record	5	
Project Schedule	10	
Local Knowledge	5	

For the Fee Proposal or Part B of the scoring method, our review of other RFP's revealed that most municipal units established a split between the technical and price portions of the RFP ranging from 50/50 to 90% for technical and 10% price.

The appropriate scoring method for fees on technical projects should be correlated to the degree of uncertainty in scope. Where the scope is well defined and the tasks to be completed are listed and described in clear sufficient detail, there may be less emphasis on the cost portion of the proposal submission. This is because the proponent can readily define the allocation of resources required for each task of the project. In these cases, the cost component of the bid may be 30 % of the total score in the bid evaluation.

Alternatively, where the scope or effort of the project is not specifically known and there is no past history for the type of project, the best quality project will be based upon the best technical submission. As such cost should be less of a factor. The engineering consulting industry (i.e. Quality Based Selection (QBS)) recommends that the cost proportion in these cases be 10 % of the total request for submission score. We recommend that Community Energy Plan development be considered in this context and that the suggested scoring methodology be 90% for the technical/managerial portion of the RFP and 10% for price.

11. Prepare the RFP Template

The RFP template is provided in a separate document. It has been developed to meet the requirements of HRM, but also to be readily be adapted to meet the needs of other municipal organizations in Canada, whether they be mixed, urban rural or northern.



Conclusions

Community Energy Planning for municipalities has been greatly considered in Canada through many facets of interested parties, including government, private and not-for-profit agencies. Despite the multitude of participants and viewpoints contributing to this knowledge-base, the development of a standardized approach to designing and implementing a CEP had not yet been completed. As such, the need to standardize the complex nature of sustainable energy and community development was evident.

The defined work scope, as outlined by HRM for the purposes of this project (Attachment 1), described the principle issues surrounding the planning for efficient and sustainable delivery of services and infrastructure to residents, in light of energy supply and demand issues, and the environmental impact of energy production and use. These amounted to 11 primary focal points regarded throughout the creation of the RFP template.

The RFP template designed for HRM, and adaptable for other Canadian municipalities, addresses the primary issues comprising a CEP, and the methodology for conducting and acquiring appropriately competent and innovative consultants to design an effective and implementable plan to achieve municipal energy sustainability specific to individual municipalities. It is based on the ideas and applied efforts of government, energy associations, enterprising Canadian municipalities, and specialized consulting firms. The essentials of the RFP sufficiently address the requirements for each stage of CEP development and are easily adaptable to any municipality, regardless of population base, economic prominence, or geographic location.

It is our belief that the outlined requirements in the RFP for appropriate planning, innovation, consideration of obstacles and stakeholder participation will facilitate successful implementation of CEPs across our nation and encourage the execution of CEPs as standard municipal practice.

Recommendations

It is anticipated that the CEP RFP template will be integrated into Canadian municipalities' long range planning. As such, it would be beneficial to initiate a tracking system in correlation with said integration. Monitoring/reviewing the implementation, and inevitably the effectiveness, of the RFP template under the governance of a national body (such as NRCan) would allow for appropriate feedback. This information would be useful to identify and rectify any shortcomings of the template, as well as highlight successful approaches that could potentially be transferable to other implementations of national, voluntary initiatives. Presenting the findings through widely accessible avenues, such as journal articles, municipal conferences, newsletters etc, would be an efficient mode of dissemination to optimize the standardized approach to future CEP development.

Ms. Cathie O'Toole
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A further recommendation to compliment the effectiveness of the CEP RFP template would be the development of a CEP awareness program for Canadian Municipalities. Although the template does provide detailed methodology for developing a CEP, including the role that must be taken on by municipalities, it is not an instruction manual for a relatively unaware council. Municipalities must contribute a significant amount to the process in the form of decision making and essentially, a knowledge base and deeper understanding of the purpose, and desired outcomes of the process. If the ultimate goal is to advance the implementation of CEPs nationally, then a foundation must be built within those people who are to undertake it. This awareness program could be delivered in the form of sustainable development seminars, training sessions, video conferencing and the like through a national body as NRCan or third party consultant with expertise in community energy planning.

Closure

This has been an enjoyable project to work on and trust that the template meets the project requirements. If you have any questions please contact us.

Yours sincerely,

JACQUES WHITFORD LIMITED

ORIGINAL SIGNED

Pat Gardner P.Eng
Project Manager

ORIGINAL SIGNED

Aftab Efran MSc.
Environmental Planner

Attachments

P:\EnvEng\100xxxx\1009416 - HRM Community Energy Plan Template\Draft report and RFP\CEP RFP report final.doc



Table 1 Summary of Discussions and Documents Reviewed for the CEP RFP Template

Phone Conversations

Person	Organization	Phone No.	Discussion
Ken Church	NRCan	613-947-8952	Two discussions were held. The first was an orientation to the project and how in his experience consultants had been appointed to these types of projects in the past and how the scope was defined. The second dealt with the reasons for failure of CEP's.
Laura Porcher	BC CEA	250-598-4034	Discussions covered issues related to how consultants are engaged, success and failures of CEP's and comparison of CEP's done for BC communities. Laura also provided other names to contact.
Matt Horne	Pembina Institute	604-874-8558	Received from Matt copies of RFP's that his organization had responded to. Also discussed ways that consultants are engaged and his perspective on success or failure of the RFP process
Gina Layte Liston	Prince George	250-614-7824	Received copy of RFP for CEP
Andy Liu	Victoria Capital District	250-360-3268	Received RFP's for Energy Baseline and Action Plan

Documents Reviewed

Document	Source
Community Energy Planning A Guide for Communities Volume 1	NRCan
A Toolkit on Community Energy Planning	BCEA
The Energy Yardstick	California Energy Commission
RFP Energy Baseline	Victoria Capital District
RFP Action Plan	Victoria Capital District
GHG RFP Action Plan	City of Vancouver
GHG RFP Action Plan	City of North Vancouver
CEP RFP	Yellowknife NWT
CEP RFP	Whistler BC
RFP Baseline	Prince George BC
CEP	Kamloops BC
CEP	Quinsal BC
CEP	Golden BC
CEP	Bowen Island BC
CEP	Nanaimo BC
CEP	Whistler BC
CEP	Banff AI
CEP	Canmore AI
CEP	Hamilton
CEP	Kane County, Illinois
CEP	Portland, Oregon
CEP	Seattle, Washington
CEP	Hamilton, Ont.
Community Energy Efficiency Plan	Southern California Local Government
CEP	San Jose
CEP	San Francisco

ATTACHMENT A



Community Energy Plan RFP Template

Background

Long-term planning is an accepted part of the planning process for most municipalities across Canada. However, the level of detail within these documents varies depending upon the regulations as laid out by the specific provincial governments. The advent of intra-provincial down loading, volatility and projected supply constraints in the energy market, as well as environmental concerns are encouraging municipalities to raise the level of importance of the long-term plan and to include energy security and environmental impacts of energy production and use in the scope of such undertakings. The inclusion of social issues, energy supply and demand, along with future availability of resources is highlighting the need for a structured approach to the development of strategic plans.

In the event that Community Energy Planning is undertaken as an integral part of a municipality's planning process and regulated at the provincial level, then it will likely become an issue too complex for many communities to undertake as an in-house activity. Consultants would be required to produce the plans, but to attain a level of consistency across the country, there needs to be some standardization of consulting capability for the work.

To that end, using the Community Energy Planning needs of the Halifax Regional Municipality as a baseline, this work proposes to develop a template for a Request for Proposals that establishes the terms and conditions for the selection of a consultant or consultants to undertake the development of a Community Energy Plan. The use of HRM as a baseline enable the RFP to consider urban, suburban, and rural issues relating to the plan. The development of the RFP will provide to prospective consultants a clear picture of the planning process, the requirements for the consultants, expected deliverables of the Community Energy Plan, and the expectations of the municipalities.

Objective

Develop an RFP template that will allow municipalities to plan for efficient and sustainable delivery of services and infrastructure to residents, in light of energy supply/demand issues, and the environmental impact of energy production and use.

Workscope

1. Research and review the approaches taken by municipalities, both in Canada and elsewhere that have retained consultants to undertake community energy plans. These might include unsolicited proposals from consultants or NGO's to municipalities, proposals from municipalities to funding agencies such as FCM (Federation of Canadian Municipalities), or RFPs from municipalities to consultants for Community Energy Plans, whether implemented or not. Evaluate collected RFPs and proposals for scope, level of detail, and methodology.
2. Identify existing or proposed requirements for sustainability planning within Canada, and in particular within the Province of Nova Scotia.

3. In conjunction with HRM management and existing planning processes and long term plans, identify and prioritise the issues to be included within the region-wide Community Energy Plan. Compare these issues with those of existing proposals. Thought should be given to organization and structure of the RFP. For example, some basic categories may include:
 - transportation
 - settlement
 - service delivery (Utilities)
 - infrastructure investment
 - social impact
 - economic impact
 - environmental impact
 - urban
 - suburban
 - rural
4. Identify the distribution of authority levels within the process of plan development and hence, the minimum required stakeholders. While the municipality's vision may encompass all aspects of life within the HRM, the municipality itself may have its authority limited to only a few areas. This will define the base level of stakeholders that must be consulted during RFP development.
5. Define the planning process that will be followed to develop the plan, and thereby the basic tenets for decision making. For example, some basic tenets may include:
 - projected population growth
 - resource availability
 - projected temperature increase due to climate change impacts
 - projected rise in sea water level due to climate change impacts
 - projected changes in precipitation due to climate change
 - projected changes in consumer energy demand patterns
6. Identify a suggested public consultation and review process.
7. Define the form of the deliverables expected from each step of the process. This deliverables might include:
 - the community vision
 - renewable resource inventory
 - recommended changes to existing planning and development processes
 - recommended actions to promote energy security, conservation, and renewable energy within the municipality
 - a framework or methodology to incorporate energy security and environmental sustainability in municipal decision making.
 - evaluation and rating of possible programs
 - benchmarks/indicators and a monitoring process
8. The RFP should contemplate a time frame for the Community Energy Plan and recommend how to implement the plan and provide for periodic updates to the plan.

9. The RFP should contemplate inclusion of a discussion of barriers to small scale renewable energy projects and distributed generation; and the respective roles of the local utility, and other levels of government.
10. Propose a scoring methodology to review RFP submissions, including a definition of the areas of expertise required of the consultant and a suggested prioritization/weighting to be used in the RFP selection process.
11. Prepare a template that summarizes the RFP document, organized in an appropriate manner such that other urban, suburban, rural or "mixed" municipalities in Canada could utilize the RFP.

SECTION 2



REQUEST FOR PROPOSAL

RFP NUMBER 02-

Closing, end of business day, @ 4:30 P.M.

Halifax Regional Municipality
Procurement Section
P.O. Box 1749, Halifax
3rd Floor, Duke Tower,
Scotia Square, 5251 Duke Street
Nova Scotia, Canada
B3J 3A5

INSERT DATE

NOTICE

REQUEST FOR PROPOSAL

Sealed Proposals for Development of a Community Energy Plan - Halifax Regional Municipality, Halifax, Nova Scotia will be received by Halifax Regional Municipality Procurement Office, 3rd Floor, Duke Tower, Scotia Square, 5251 Duke Street, P.O. Box 1749, Halifax, Nova Scotia, Canada, B3J 3A5, until end of business day, 4:30 P.M., Friday **???**.

All questions concerning this Request for Proposal shall be directed to Dale Carmen, Procurement Coordinator, Phone 490-6476, Monday through Friday, 8:30 A.M. to 4:30 P.M. or E-mail to **carmend@region.halifax.ns.ca**. and those of a technical nature to **????** or E-mail to **????**

The Halifax Regional Municipality reserves the right to reject any or all proposals and to award the contract in its entirety, or in part, whichever in its opinion best serves the interest of the Halifax Regional Municipality.

Anne Feist
Manager of Procurement

INTRODUCTION

Request for proposals is addressed to qualified individuals/firms for the furnishing and delivering of consulting services to provide a Community Energy Plan for the Halifax Regional Municipality.

TITLE: Community Energy Plan

Requests for proposals will be received at the Halifax Regional Municipality Procurement Office, 3rd Floor, Duke Tower, Scotia Square, 5251 Duke Street, P.O. Box 1749, Halifax, Nova Scotia, Canada, B3J 3A5 until end of business day, 4:30 P.M., Local Time, on ?????. Proposals will be binding 60 Days: Unless otherwise specified, all formal proposals submitted shall be irrevocable for 60 calendar days following proposal opening date, unless the respondent(s), upon request of the Purchasing Agent, agrees to an extension.

GENERAL INSTRUCTIONS

1. **INSTRUCTIONS AND FORMS:** The Request for Proposal document may be obtained in person or by mail from, Halifax Regional Municipality Procurement Office, 3rd Floor, Duke Tower, Scotia Square, 5251 Duke Street, Halifax, Nova Scotia, Canada.

- (a) All proposals are to be submitted in accordance with Request for Proposal document.
- (b) All proposals are to be submitted in sealed, plainly marked envelopes.
- (c) Additional information or clarifications of any of the instructions or information contained herein may be obtained from the Halifax Regional Municipality Procurement Office.
- (d) Any respondent or respondents finding any discrepancy in or omission from the proposal, in doubt as to their meaning, or feeling that the proposal is discriminatory, shall notify at once the Halifax, Regional Municipality Procurement Office in writing within 5 days of the scheduled opening of proposals. Exceptions as taken in no way obligates the Halifax Regional Municipality to change the proposal. The Halifax Regional Municipality Procurement Office will notify all respondents in writing, by addendum duly issued, of any interpretations made of proposal instructions.
- (e) The Halifax Regional Municipality will assume no responsibility for oral instructions or suggestion. All official correspondence in regard to the proposal should be directed to and will be issued by the Manager of Procurement, Halifax Regional Municipality.

2. **ELIGIBILITY:**

Prospective proponents are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of the Halifax Regional Municipality, give rise to conflict of interest in connection with this project. Proponents are to submit with their proposal documents any issue that may constitute a conflict of interest violation for review by the Halifax Regional Municipality. Halifax Regional Municipality=s decision on this matter will be final.

3. **RESERVATIONS:**

- (a) The Halifax Regional Municipality reserves the right to reject or accept any or all proposals or parts of proposals, when in this reasoned judgement, the public interest will be served thereby.
- (b) The Halifax Regional Municipality may waive formalities or technicalities in proposals as the interest of the Halifax Regional Municipality may require.
- (c) The Halifax Regional Municipality may waive minor differences in the proposal provided these differences do not violate the proposal intent.

4. DISPUTES:

In cases of dispute as to whether or not an item or service quoted or delivered meets proposal requirements, the decision of the Halifax Regional Municipality, or authorized representatives, shall be final and binding on all parties.

5. PROPONENTS EXPENSES:

Proponents are solely responsible for their own expenses in preparing, delivering or presenting a proposal and for subsequent negotiations with the Halifax Regional Municipality, if any.

6. EXCEPTIONS:

The submission of a proposal shall be considered an agreement to all the terms and conditions provided herein and in the various proposal documents, unless specifically noted otherwise in the proposal.

7. CURRENCY AND TAXES:

Prices are to be quoted:

- in Canadian dollars;
- inclusive of duty, where applicable;
- exclusive of HST.

8. COMPLIANCE WITH LAWS:

The contractor will give all the notices and obtain all the licenses and permits, required to perform the work. The contractor will comply with all laws applicable to the work or performance of the contract.

9. SECURITY:

Due to the confidentiality of the information Consultants may be required to pass a security check by the Halifax Regional Municipality Police Department. The Halifax Regional Municipality Police Department may disqualify a Consultant based upon their investigation and will be the sole judge of security clearance. The Halifax Regional Municipality Police Department is under no obligation to release the reasons for any disqualification.

REQUIREMENTS

1. BACKGROUND:

The Halifax Regional Municipality was formed on April 1, 1996 through the amalgamation of the former City of Halifax, City of Dartmouth, Town of Bedford, Halifax County Municipality, and Metropolitan Authority. The new municipality spans a geographic area of 5,600 square kilometres and provides municipal services to a population of approximately 350,000. These services include such typical municipal functions as Police and Fire protection, community Planning and Development, and Transportation and Public Works, Community Culture and Economic Development, and Environmental Management.

2. INTENT:

The Halifax Regional Municipality wishes to contract for the Development of a Community Energy Plan (CEP) to be presented to HRM Council for approval in early 2007.

3. SCOPE OF THE WORK:

3.1 Introduction

[A general introduction to the proposal call which can be edited to suit requirements]

The Halifax Regional Municipality will receive proposals from qualified consultants/companies with strong technical backgrounds and proved effective experience in preparing community energy plans and programs in both the municipal government and private sectors. A creative problem solving approach that meets the criteria for Partners for Climate Protection Milestones and also tailored to the physical, socioeconomic, and environmental needs specific to HRM as a municipality, including its ongoing related environmental planning is desired.

The goal of a Community Energy Plan is to design for energy efficiency in community systems as a tool of reaching long term sustainability. A CEP selects land use and full community design and infrastructure options based upon their ability to make the most efficient use of energy. The CEP is a collaborative effort where contributions to the direction and goals of the plan are sought and incorporated.

The required Community Energy Plan for HRM must be thorough, practical, achievable, cost effective and measurable. HRM is also interested in innovative, strategic approaches that meet this criterion. The following broad objectives are to be met.

- a) The CEP should promote energy efficiency and establish a commitment to increased renewal energy capacity.
- b) The CEP should set out goals to ensure energy security within the municipality.
- c) The CEP shall ensure continued delivery of municipal services requiring energy inputs.
- d) The CEP should lead to greater GHG emissions reduction
- e) The CEP shall be consistent with existing HRM strategic, environmental, and planning objectives.

A Community Energy Plan is a voluntary planning tool which takes a long range (100 year) view of community development towards a sustainable future. It influences a municipality's land use, transportation, site planning, building design, infrastructure design and efficiency and planning for new supply energy options. The goal of a community energy plan is to minimize energy use, establish energy security and maximize renewable energy development in all aspects of municipal growth and operations.

3.2 Community Description

[This section will allow all municipal units to describe to proponents their community. References should be made to any online information such as maps, GIS database information, budget information, planning policy(s).]

- a) Population and type (urban, rural, combination)

- b) List of primary industries
- c) Sustainability development history and environmental goals of HRM
- d) Detailed descriptions of any milestones already developed or implemented (which would hopefully stem from the list in the Scope of Work)
- e) List of any existing action or sustainable development groups.
- f) Electrical Regulatory Regime

3.3 Proposal Process

[This is standard information typically supplied for all tender processes. It tells the when and what and how]

- a) Proponent's meeting
- b) Enquiries
- c) Submission Deadline
- d) Proposal Format
- e) Evaluation and Selection

The evaluation and selection will follow a two envelope system. The points for the technical portion of the proposal will total 90% and the fee portion will be worth 10%. Points for the fee portion of the work will be made on a pro-rated basis. The following points allocation is provided for the technical portion of the proposal.

	Points	Consultant A	Consultant B	Consultant C
1. Firm				
1.1 Experience with Community Energy Plan	5			
1.2 Experience with Public Consultation Process	5			
1.3 Firm Background, knowledge of HRM requirements	5			
2. Project Team				
2.1 Project Manager	5			
2.2 Project Team members, roles, experience and qualifications	20			
3. Methodology and Approach				
3.1 Overall Approach to completing scope of work tasks	25			
3.2 Public consultation process				
3.3 Identification and Incorporation of Stakeholders	10			
3.4 Creativity and innovation	5			
	5			
4. Schedule	5			
Total Score of 90	90			

The consultant's minimum qualifications are described in Section 4.0 below.

3.4 Scope of Work

The Partners for Climate Protection from the Federation of Canadian Municipalities, uses the following milestones as a baseline for development of municipal action on Greenhouse Gas emission reductions:

- a) Take Stock
- b) Set a Reduction Target
- c) Develop a Local Action Plan
- d) Implement the Plan
- e) Measure Progress

While a CEP is clearly different from a GHG emission reduction plan, this same set of milestones is applicable in creating a CEP. The RFP contemplates at a minimum all five milestones. The following tasks are defined as the minimum requirement.

- a) Conduct an Energy Resource Assessment of the municipality.

A detailed analysis based on urban, suburban and rural energy usage should be developed as energy reduction plans will depend on where and for what the energy is being used. The focus should be on the source of production, how it is produced, energy intensity factors and energy security. Include a cost analysis/breakdown of the energy inventory.

- b) Link the energy consumption and production to environmental output, related to air emissions through the GHG conversion factors.

- This should allow a justified comparison of energy costs to environmental costs and aid significantly in determining energy reduction goals

- c) Perform an anticipated energy demand project and supply risk assessment for a future date.

- This should be based on anticipated population, economic, land use growth, and municipal development.

- d) Determine goals (based on monetary goals and environmental goals) for future energy supply. This should include at a minimum:

- a) Growth of domestic energy sources.
- b) Increase in renewable energy sources.
- c) Percentage reliance on energy from external sources.
- d) Long term and short term goals should be addressed.

- e) Describe the energy supply, use and demand issues and determine specific action involved in order to reach the energy reduction goals for each of the following sectors. Suggest and described any other sectors that might apply. Innovation is a crucial component in this stage. Focus sectors include the following:

- i. Land Use Planning and Transportation

Transportation is one of the major ways in which energy is spent within communities. Settlement patterns and land-use planning decisions have enormous impacts on the way we commute, the

length of our commutes, the reasons we commute, and the modes of transportation we choose. In a compact neighbourhood, or one that is part of a network of regional nodes, citizens often have more transportation options including walking, biking, or taking the bus. If the neighbourhood is a complete neighbourhood with a mix of residential, commercial, institutional and recreational uses, the need for commuting itself might be reduced since citizens may not need to leave the neighbourhood to meet daily needs. Additionally, availability of public transit incentives and barriers to the use of the single occupancy vehicle influence citizens' transportation decisions. The energy implications of land use planning and transportation must be explored and recommendation must be made to bring future land use and transportation planning in line with energy reduction, efficiency, and diversification goals. The following issues must be addressed at a minimum:

- a. contiguous development patterns;
- b. parking plans and siting;
- c. street design and traffic rules;
- d. trip reduction measures;
- e. stakeholder participation
- f. alternative (public) transit fuels

ii Neighbourhood/Site Planning and Building Design

The design of buildings and their relationship to one another as well as to other landscape features can have a tremendous impact on the demand and efficiency of energy use. Attached buildings, for example, lose less heat, while energy efficient windows and ventilation systems can reduce the need for space heating significantly. Lot and building orientation with respect to natural elements such as the sun and wind are key factors. The attractiveness of the street and neighbourhood to pedestrians and cyclist can also be important as it influence transportation choices. The following issues need to be considered and interventions recommended to make site planning and building design practices consistent with the goals of the CEP:

- a. building and appliance and appliance efficiency
- b. solar orientation
- c. landscaping
- d. neighbourhood design
- e. wind shielding and shading
- f. pedestrian facilities and orientation
- g. transit facilities and orientation

iii Infrastructure Efficiency

Large amounts of energy are spent in municipal infrastructure delivery including water supply, sewers, and solid waste management. Energy is spent to treat and pump water and sewage, as well as to pick up and dispose of waste. Recycling processes are also often energy intensive. Recommendations into infrastructure design, implementation and maintenance that is conscious of energy use and efficiency is required as part of the CEP. Best practices and practical solutions should be presented in each of the following areas:

- a. water supply and use
- b. wastewater collection and storm drainage
- c. recycling facilities

- d. heat and power recovery
- e. joint infrastructure planning and delivery

iv Alternative Energy Supply

While municipalities do not usually have a mandate for the supply and distribution of energy, the growth of alternative energy sources are dependant on a variety of municipal decisions. Various municipal building requirements can determine whether or not it is feasible for landowners to orient their homes for the best solar energy, to utilize ground source heat pumps on their land, or to install wind turbines on their property. Zoning can influence the decision of major renewable energy producers to location in a neighbourhood or not. Municipal operations also have opportunities to adapt their own operations to include energy recovery from waste including landfill gas. Projects such as district heating systems can only be implemented with full participation from the municipality along with other partners. Incentives programs from the municipality can also encourage the development of alternative energy sources. The CEP must address the full range of potential alternative energy options including the following, and must make recommendations as to the role of the municipality in helping to develop these:

- a. "district" energy
 - b. waste heat utilization
 - c. ground source heat pumps
 - d. co-generation of heat and power
 - e. wood-waste systems
 - f. solar technologies
 - g. alternative fuels
 - h. landfill gas utilization
 - i. wind
- f) Design and implement a consultation process to gain the necessary collaboration on the CEP including necessary departments of government (parks, engineering, etc), citizens, neighbourhood communities, developers and consultants, provincial government, transportation agencies, energy utilities, military bases. Develop a means to communicate with stakeholders on the plan and provide information on how the plan is developing.
- g) Explore additional benefits to be realized from implementation of the steps in Point 6.
- Address social impacts, economic impacts, health benefits, and contribution to the national effort of GHG reduction and other environmental issues. A complete picture of the benefits of the plan would provide strong support and incentive to ensure the time and financial effort to implement the program are present.
- h) Develop a companion program to address internal education and awareness, as well as a strategy for public outreach and education.
- As with the development stakeholders, the general population should be educated in the environmental goals of its municipal government, as awareness and understanding leads to support.
- i) Design a monitoring program such that goals can be measured following CEP implementation, and evaluated in order to reassess and carry on with CEP goals.

- j) Assist in identifying current available funding applications to improve energy efficiency. Identify potential projects, funding opportunities, bylaw changes, policy changes etc. that may have the potential to be funded by supporting government programs.
- While the implementation of a CEP is inevitably a cost saving measure, and therefore, an investment as opposed to an expenditure, the available funding/financial assistance should be exploited. Examples include Green Municipal Enabling Funds, Green Municipal Investment Funds, Atlantic Innovation Fund, Atlantic Canada Opportunities Agency, NS Resource Recovery Fund, etc, etc.
- k) Design an Implementation Plan
- Discuss barriers forecast in implementing the CEP and recommend appropriate mechanisms by which to overcome them (such as government programs, financial tools, etc.).

4.0 Consultant Minimum Qualifications

The development of the Community Energy Plan will require diverse and specialized expertise. The consultant team shall include the following professionals:

- A qualified and highly capable Project Manager who can lead the project and coordinate team members on the tasks required. The Project Manager must understand Community Energy Plans, be able to communicate with the municipality understanding its objectives, and be capable of executing the project through the course of schedule commitments and budget allocations. The Project Manager shall fully understand the level of work required for each project task and will lead the public consultation process for the project. The proposal shall demonstrate this knowledge as well as which and how collaboration with interrelated organizations to the CEP will be led by the Project Manager.
- The project team will require an energy engineer/scientist who is fully knowledgeable of existing and potential energy sources and the limitations of these sources within the municipality. These energy sources include electricity, natural gas, fuel oil and other heating oils, transportation fuels, renewable energy sources, and potential existing waste energy (heat) sources.
- The project team will require an energy engineer/scientist who can compile the existing aspects of energy utilization with the municipality as well as projected potential future uses given projected growth scenarios. The energy utilization analysis will include residential, commercial, intuitional, industrial, transportation and other sectors.
- The project team will require an urban planner who understands existing and likely future growth in the municipality and environmental engineers or scientists who are versed in the latest sustainable development frameworks and their applications.
- The project team will require specific analysis is several subject areas and would benefit from the expertise of an economist (for price forecasts), regulatory specialist (to evaluate barriers and recommend solutions), and support for public consultation and education.
- The project team will need to demonstrate experience in the development of community energy plans.
- The proposal shall clearly demonstrate how the consultant will approach the various issues of the CEP based upon the qualifications of the proposed team. An organizational chart and manpower loading matrix shall be provided to demonstrate the specific technical resources

proposed for the project; the manpower allocation matrix shall be broken down by each major project task.

GENERAL:

Time is of the essence in the contract resulting from this proposal.

Delivery of all work should be completed within 8 months from date of purchase order.

A. CONTRACT ADMINISTRATION:

All questions concerning this Request for Proposal shall be directed to, Dale Carmen, Procurement Coordinator, Phone 490-6476, Monday through Friday, 8:30 A.M. to 4:30 P.M. or E-mail to **carmend@region.halifax.ns.ca.** and those of a technical nature to ???or E-mail to ???

B. PRE-PROPOSAL CONFERENCE:

Each proposer must completely satisfy themselves as to the exact nature and existing conditions of the requirements and for the extent and quality of work to be performed. Failure to do so will not relieve the successful proposer (aka the Consultant) of their obligation to carry out the provisions of the contract.

C. COORDINATION:

After contract award, all coordinating for services will be with ??? or designee.

The successful proposer shall designate in writing, a project manager and all coordination for services between Halifax Regional Municipality and the successful proposer shall be the responsibility of the respective managers.

D. PROPOSER=S QUALIFICATIONS:

No contract will be awarded except to responsible proposers capable of providing the services contemplated.

Proposers must be primarily engaged in providing the services as outlined in this Request for Proposal.

Proposers shall be independent of and not affiliated with any prime service provider or manufacturer.

Proposers must have an extremely comprehensive understanding in the areas listed in this Request for Proposal. Understanding and previous experience in all aspects of wind energy development and siting criteria is very essential criteria in the qualifying process.

Proposers shall have a proven record of having provided this service requirement. The Halifax Regional Municipality reserves the right to check all references furnished and consider the responses received in determining the award of this proposal.

The proposer=s personnel and management to be utilized in this service requirement shall be knowledgeable in their areas of expertise. The Halifax Regional Municipality reserves the right to perform investigations as may be deemed necessary to insure that competent persons will be utilized in the performance of the contract.

The proposer must be currently in the business of management consulting/engineering/planning and must have been engaged in this field for a period of no less than three years.

E. INDEMNITY:

If the contract is awarded, the successful proposer will be required to indemnify and hold the Halifax Regional Municipality harmless and against all liability and expenses, including solicitor=s fees, howsoever arising or incurred, alleging damage to property or injury to, or death of, any person arising out or attributable to the consultant=s performance of the contract awarded.

Any property or work to be provided by the consultant under this contract will remain at the consultant=s risk until written acceptance by the Halifax Regional Municipality; and the consultant will replace, at the consultant=s expense, all property or work damaged or destroyed by any cause whatsoever.

F. SUBMISSION OF PROPOSAL DOCUMENTS:

The submission of a proposal on this service will be considered as a representation that the propose has carefully investigated all conditions which may affect or may, at some future date, affect the performance of the services covered by the proposal, the entire area to be services as described in the attached specifications and other contract documents and that the proposer is fully informed concerning the conditions to be encountered, quality and quantity of work to be performed and materials to be furnished; also, that the proposer is familiar with all Federal and Provincial laws, all codes and ordinances of the Halifax Regional Municipality which in any way affect the prosecution of the work or persons engaged or employed in the work.

In responding to this proposal, each proposer shall, include, as a minimum, a Technical Proposal and a Cost Proposal. The proposal is not complete unless it contains a Technical Proposal which addresses the requirements described herein, and a separate Cost Proposal that details all costs for the proposed services. Both the Technical Proposal, which shall be identified as envelope #1, and the separate Cost Proposal, which shall be identified as envelope #2, shall be submitted simultaneously.

The Technical Proposal, identified as envelope #1, shall include as a minimum:

- (a) General: Proposer shall provide the name of the firm, Office address, telephone number and facsimile number.
- (b) Proposer=s Credentials: Proposers shall provide, in detail, their credentials in the field of providing management consulting services particularly on wind energy development, and any information which documents successful and reliable experience in past contracts, especially those contracts related to the requirements of this Request for Proposal. Failure to do so may be cause for rejection of proposal. Include a description of the proposer=s business history, number of years in operation, experience and financial and audit information.

- (c) Staff Credentials: Proposers shall provide the name, title, address and telephone number of persons who will both manage and be assigned to perform the services under the proposal. Failure to do so may be cause for rejection of proposal.
- (d) Resumes: A one (1) page resume, including references, detailing educational qualifications and previous work assignments related to this Request for Proposal for each person who will perform the services required. Failure to do so may be cause for rejection of proposal. These credentials may be subject to verification. In the event there would be a change in the persons named and assigned to perform the services under the contract, the contractor shall be required to submit, for approval to the Halifax Regional Municipality, the credentials and resumes of the persons the contractor proposes to perform the services under the contract. Failure to do so may be cause for termination of the contract.
- (e) References: Proposers shall provide a list of three (3) applicable customer references who have contracted for services offered by the proposer which is considered identical or similar to the requirements of this Request for Proposal. Failure to do so may cause for rejection of proposal. The list should include the following information:
 - (a) Company Name and Address
 - (b) Contracting Officer and Telephone Number
 - (c) Technical Representative and Telephone Number, and
 - (d) A brief, written description of the specific services provided.
- (f) Understanding and Approach: Proposers shall provide a response to demonstrate understanding of the subject matter, including, but not limited to, the Scope of Work as well as the approach that will be taken to accomplish the ***** services related to *****. This submittal should be included in envelope #1.
- (g) Additional brief facts concerning your organization which you feel are critical in evaluating your proposal.

The Cost Proposal, identified as envelope #2, shall include proposers firm fixed price for this service as outlined in the proposal specifications, Request for Proposal. Price may not be the determining factor for award. Proposers should include with the Cost Proposal, on company letterhead, details of all individual costs of the proposed services. Price data should include fixed price, estimated hours of work by key staff and individual hourly cost for staff. The Halifax Regional Municipality may negotiate a final offer with the selected proposer.

To assure a uniform review process and to obtain the maximum degree of comparability, each proposal shall be presented in the order of the above.

Elaborate brochures or voluminous examples are not required nor desired.

Three (3) copies of proposal both technical and price components are to be submitted.

G. METHOD OF AWARD:

Technical Proposals and Cost Proposals shall be submitted simultaneously, in separate sealed identified envelopes. The proposers found unacceptable during the technical evaluation shall not be given further consideration and their technical proposal will be returned with their unopened cost proposal.

All proposals will be evaluated and ranked against the criteria listed in the attached Appendix A - Proposal Evaluation Criteria.

This evaluation process will be carried out by an evaluating committee who will establish the ranking of all the bidders and produce a short list of proponents. The short-listed proponents may be invited to make a brief presentation.

The results of the above process will be brought to the appropriate staffing level with a recommendation from the evaluating committee to award.

The Halifax Regional Municipality intends to make total proposed award to the responsible, responsive proposer based on the following evaluation criteria listed on Appendix A.

Proposer=s overall response to this solicitation must include, but not limited to:

- (a) Proposer=s corporate experience/background.
- (b) Qualifications of the proposer=s support staff.
- (c) Proposer=s client satisfaction.
- (d) Proposer=s overall responsiveness in clearly stating the proposer=s technical understanding of the Request for Proposal subject matter and their approach to accomplishing the services.
- (e) Proposer=s time required to perform the service from date of purchase order.
- (f) Adherence to proposal format.
- (g) Fixed firm price for the services outlined in the proposal, Request for Proposal Document AD@ which shall be submitted in a separate, sealed envelope, clearly identified as envelope #2 ACost Proposal@. Price may not be the determining factor.

H. METHOD OF PURCHASE:

A purchase order will be issued by the Procurement Office for all services performed under this contract prior to the actual services being started.

I. BILLING AND PAYMENT:

The proposer shall submit an invoice for services provided to:

**Halifax Regional Municipality
P.O. Box 1749, Halifax, Nova Scotia
B3J 3A5
Attn: Accounts Payable**

The invoice shall contain the following information:

Purchase Order Number;
Period of Work;
Itemized List of Services Provided;

Payment shall be made upon request of proper invoice from the contractor and authorized by the head of the department or designee. Normal payment terms for the Halifax Regional Municipality is 30 days from receipt.

J. EXCEPTIONS:

The proposer shall furnish a statement on company letterhead giving complete description of all exceptions to the terms, conditions and specifications. Failure to furnish the statement will mean that the proposer agrees to meet all requirements of the Request for Proposal.

K. TERMINATION:

Termination for Convenience: The Halifax Regional Municipality may terminate a contract, in whole or in part, whenever the Halifax Regional Municipality determines that such a termination is in the best interest of the Halifax Regional Municipality, without showing cause, upon giving written notice to the proposer. The Halifax Regional Municipality shall pay all reasonable costs incurred by the proposer up to the date of termination. However, in no event shall the proposer be paid an amount which exceeds the bid price for the work performed. The proposer shall not be reimbursed for any profits which may have been anticipated but which have not been earned up to the date of termination.

Termination for Default: When the proposer has not performed or has unsatisfactorily performed the contract, the Halifax Regional Municipality may terminate the contract for default. Upon termination for default, payment will be withheld at the discretion of Halifax Regional Municipality. Failure on the part of the proposer to fulfil the contractual obligations shall be considered just cause for termination of the contract. The proposer will be paid for work satisfactorily performed prior to termination, less any excess costs incurred by the Halifax Regional Municipality in re-procuring and completing the work.

L. AWARD OF PROPOSALS:

The Halifax Regional Municipality reserves the right to modify the terms of the Request for Proposal at any time at its sole discretion.

This Request for Proposal should not be construed as a contract to purchase goods or services. The Halifax Regional Municipality is not bound to accept the lowest priced or any proposal of those submitted. Proposal will be assessed in light of the evaluation criteria.

Subsequent to the submissions of proposals, interviews may be conducted with some of the proponents, but there will be no obligation to receive further information, whether written or oral from any proponent.

The Halifax Regional Municipality will not be obligated in any manner to any proponent whatsoever until a written contract has been duly executed relating to an approved proposal.

Neither acceptance of a proposal nor execution of a contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

M. AVAILABILITY OF FUNDS:

The contractual obligations of the Halifax Regional Municipality under this contract is contingent upon the availability of appropriated funds from which payment for this contract can be made.

N. INTERPRETATION:

The contract resulting from this Request for Proposal shall be construed under the laws of the Province of Nova Scotia.

O. INTEGRATION:

This Request for Proposal document, the proposer=s response to this solicitation, and subsequent purchase order(s) to the successful proposal contain the entire understanding between parties, and any additions or modifications hereto may only be made in writing executed by both parties.

P. NON-ASSIGNMENT OF CONTRACT:

The proposer shall not assign the contract, or any portion thereof, except upon the written approval of the Halifax Regional Municipality.

Q. PUBLIC INFORMATION/PROPRIETARY INFORMATION:

The Halifax Regional Municipality is subject to the Freedom of Information and Protection of Privacy legislation, which is part of the Municipal Government Act, Part XX. To review the provisions of this act you may view it at [http://www.gov.ns.ca/legi/legc/bills/57th_1st/3rd_read/b047\(1\).htm](http://www.gov.ns.ca/legi/legc/bills/57th_1st/3rd_read/b047(1).htm) and go to Part XX FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY

CONTRACT AGREEMENT:

The selected proposer will be required to enter into a contract agreement with the Halifax Regional Municipality. The format of the contract agreement to be executed is attached for your information (Attachment #B).

R. INTELLECTUAL PROPERTY RIGHTS:

The Halifax Regional Municipality will be the owner of the intellectual property rights, including patent, copyright, trademark, industrial design and trade secrets in any deliverable product or product developed through this contract. Licensing and marketing rights to the developed product will not be granted in the contract. Proposals regarding these rights should not be submitted in response to this Request for Proposal and will not be considered in evaluating responses. In the future the Halifax Regional Municipality elects to commercialize the developed product, the licensing and marketing rights will be negotiated separately.

S. CONFIDENTIALITY:

The selected proposer agrees not to release or in any way cause to release any confidential information of the Halifax Regional Municipality unless they have been specifically approved to so in writing.

24. ADDED VALUE

HRM is interested in maximizing the value of expenditures as it relates to achieving additional value that would further benefit HRM and its operation, as well as its community of citizens and their tax based funding. As such, bidders are encouraged to consider, develop and propose value added concepts, programs, components and the like that would further enhance the proposed acquisition represented in this solicitation request.

SECTION 3

1 Introduction

[A general introduction to the proposal call which can be edited to suit requirements]

The Municipality will receive proposals from qualified consultants/companies with strong technical backgrounds and proved effective experience in preparing community energy plans and programs in both the municipal government and private sectors. A creative problem solving approach that meets the criteria for Partners for Climate Protection Milestones and also tailored to the physical, socioeconomic, and environmental needs specific to HRM as a municipality, including its ongoing related environmental planning is desired.

The goal of a Community Energy Plan is to design for energy efficiency in community systems as a tool of reaching long term sustainability. A CEP selects land use and full community design and infrastructure options based upon their ability to make the most efficient use of energy. The CEP is a collaborative effort where contributions to the direction and goals of the plan are sought and incorporated.

The required Community Energy Plan for the municipality must be thorough, practical, achievable, cost effective and measurable. The municipality is also interested in innovative, strategic approaches that meet this criterion. The following broad objectives are to be met.

- a) The CEP should promote energy efficiency and establish a commitment to increased renewal energy capacity.
- b) The CEP should set out goals to ensure energy security within the municipality.
- c) The CEP shall ensure continued delivery of municipal services requiring energy inputs.
- d) The CEP should lead to greater GHG emissions reduction
- e) The CEP shall be consistent with existing municipality strategic, environmental, and planning objectives.

A Community Energy Plan is a voluntary planning tool which takes a long range (100 year) view of community development towards a sustainable future. It influences a municipality's land use, transportation, site planning, building design, infrastructure design and efficiency and planning for new supply energy options. The goal of a community energy plan is to minimize energy use, establish energy security and maximize renewable energy development in all aspects of municipal growth and operations.

2 Community Description

[This section will allow all municipal units to describe to proponents their community. References should be made to any online information such as maps, GIS database information, budget information, planning policy(s).]

- a) Population and type (urban, rural, combination)
- b) List of primary industries
- c) Sustainability history and environmental goals
- d) Detailed descriptions of any milestones already developed or implemented (which would hopefully stem from the list in the Scope of Work)
- e) List of any existing action or sustainable development groups.
- f) Electrical Regulatory Regime

3 Proposal Process

[This is standard information typically supplied for all tender processes. It tells the when and what and how]

- a) Proponent's meeting
- b) Enquiries
- c) Submission Deadline
- d) Proposal Format
- e) Evaluation and Selection

Assessment Points for Methodology, Management & Team 90%; Fee 10%

The breakdown of the factors making up the Technical/Managerial portion of the proposal is as follows:

Consultant Project Qualifications		Technical/Managerial Score	
Technical (50%)			
Relevant Technical Competence (Team)	15	50	
Methodology	15		
Experience on Similar Projects	15		
Commitment of Resources to the Project	5		
Managerial (40%)			
Management Competence	20	40	
Proven Performance Record	5		
Project Schedule	10		
Local Knowledge	5		

4 Scope of Work

The Partners for Climate Protection from the Federation of Canadian Municipalities, uses the following milestones as a baseline for development of a CEP:

- a) Take Stock
- b) Set a Reduction Target
- c) Develop a Local Action Plan
- d) Implement the Plan
- e) Measure Progress

The RFP encompasses all five milestones. The following tasks are defined as the minimum requirement.

- 1) Conduct an energy resource assessment of the municipality.
A detailed analysis based on urban, suburban and rural energy usage should be developed as energy reduction plans will depend on where and for what the energy is being used. The focus should be on the source of production, how it is produced, energy intensity factors and energy security. Include a cost analysis/breakdown of the energy inventory.

- 2) Link the energy consumption and production to environmental output, related to air emissions through the GHG conversion factors.
 - This should allow a justified comparison of energy costs to environmental costs and aid significantly in determining energy reduction goals
- 3) Perform an anticipated energy demand project and supply risk assessment for a future date.
 - This should be based on anticipated population, economic, land use growth, and municipal development.
- 4) Determine goals (based on monetary goals and environmental goals) for future energy supply. This should include at a minimum:
 - a) Growth of domestic energy sources.
 - b) Increase in renewable energy sources.
 - c) Percentage reliance on energy from external sources.
 - d) Long term and short term goals should be addressed.
- 5) Determine specific action involved in order to reach the energy reduction goals, Innovation is a crucial component in this stage. Focus sectors include the following:

a) Land use planning and Transportation

Transportation is one of the major ways in which energy is spent within communities. Settlement patterns and land-use planning decisions have enormous impacts on the way we commute, the length of our commutes, the reasons we commute, and the modes of transportation we choose. In a compact neighbourhood, or one that is part of a network of regional nodes, citizens often have more transportation options including walking, biking, or taking the bus. If the neighbourhood is a complete neighbourhood with a mix of residential, commercial, institutional and recreational uses, the need for commuting itself might be reduced since citizens may not need to leave the neighbourhood to meet daily needs. Additionally, availability of public transit incentives and barriers to the use of the single occupancy vehicle influence citizens' transportation decisions. The energy implications of land use planning and transportation must be explored and recommendation must be made to bring future land use and transportation planning in line with energy reduction, efficiency, and diversification goals. The following issues must be addressed at a minimum:

- a. contiguous development patterns;
 - b. parking plans and siting;
 - c. street design and traffic rules;
 - d. trip reduction measures;
 - e. stakeholder participation
 - f. alternative (public) transit fuels
- b. Site Planning and Building Design

The design of buildings and their relationship to one another as well as to other landscape features can have a tremendous impact on the demand and efficiency of energy use. Attached buildings, for example, lose less heat, while energy efficient

windows and ventilation systems can reduce the need for space heating significantly. Lot and building orientation with respect to natural elements such as the sun and wind are key factors. The attractiveness of the street and neighbourhood to pedestrians and cyclist can also be important as it influence transportation choices. The following issues need to be considered and interventions recommended to make site planning and building design practices consistent with the goals of the CEP:

- a. solar orientation
- b. building and appliance and appliance efficiency
- c. landscaping
- d. wind shielding and shading
- e. pedestrian facilities and orientation
- f. transit facilities and orientation

c. Infrastructure Efficiency

Large amounts of energy are spent in municipal infrastructure delivery including water supply, sewers, and solid waste management. Energy is spent to treat and pump water and sewage, as well as to pick up and dispose of waste. Recycling processes are also often energy intensive. Recommendations into infrastructure design, implementation and maintenance that is conscious of energy use and efficiency is required as part of the CEP. Best practices and practical solutions should be presented in each of the following areas:

- a. water supply and use
- b. wastewater collection and storm drainage
- c. recycling facilities
- d. heat and power recovery
- e. joint infrastructure planning and delivery

d. Alternative Energy Supply

While municipalities do not usually have a mandate for the supply and distribution of energy, the growth of alternative energy sources are dependant on a variety of municipal decisions. Various municipal building requirements can determine whether or not it is feasible for landowners to orient their homes for the best solar energy, to utilize ground source heat pumps on their land, or to install wind turbines on their property. Zoning can influence the decision of major renewable energy producers to location in a neighbourhood or not. Municipal operations also have opportunities to adapt their own operations to include energy recovery from waste including landfill gas. Projects such as district heating systems can only be implemented with full participation from the municipality along with other partners. Incentives programs from the municipality can also encourage the development of alternative energy sources. The CEP must address the full range of potential alternative energy options including the following, and must make recommendations as to the role of the municipality in helping to develop these:

- a. "district"
- b. waste heat utilization
- c. ground source heat pumps
- d. co-generation of heat and power
- e. wood-waste systems

- f. solar technologies
 - g. alternative fuels
 - h. landfill gas utilization
 - i. wind
- 6) Design and implement a consultation process including necessary departments of government (parks, engineering, etc), citizens, neighbourhood communities, developers and consultants, provincial government, transportation agencies, energy utilities, military bases.
 - 7) Explore additional benefits to be realized from implementation of the steps in Point 6.
 - Address social impacts, economic impacts, health benefits, and contribution to the national effort of GHG reduction and other environmental issues. A complete picture of the benefits of the plan would provide strong support and incentive to ensure the time and financial effort to implement the program are present.
 - 8) Develop a companion program to address internal education and awareness, as well as a strategy for public outreach and education.
 - As with the development stakeholders, the general population should be educated in the environmental goals of its municipal government, as awareness and understanding leads to support.
 - 9) Design a monitoring program such that goals can be measured following CEP implementation, and evaluated in order to reassess and carry on with CEP goals.
 - 10) Assist in preparing funding applications. Identify projects, funding opportunities, bylaw changes, policy changes etc.
 - While the implementation of a CEP is inevitably a cost saving measure, and therefore, an investment as opposed to an expenditure, the available funding/financial assistance should be exploited. Examples include Green Municipal Enabling Funds, Green Municipal Investment Funds, Atlantic Innovation Fund, Atlantic Canada Opportunities Agency, NS Resource Recovery Fund, etc, etc.
 - 11) Design an Implementation Plan
 - Discuss barriers forecast in implementing the CEP and recommend appropriate mechanisms by which to overcome them (such as government programs, financial tools, etc.).

5 Consultant Minimum Qualifications

The development of the Community Energy Plan will require diverse and specialized expertise. The consultant team shall include the following professionals:

- A qualified and highly capable Project Manager who can lead the project and coordinate team members on the tasks required. The Project Manager must understand Community Energy Plans, be able to communicate with the municipality understanding its objectives, and be capable of executing the project through the course of schedule commitments and

budget allocations. The Project Manager shall fully understand the level of work required for each project task and will lead the public consultation process for the project. The proposal shall demonstrate this knowledge as well as which and how collaboration with interrelated organizations to the CEP will be led by the Project Manager.

- The project team will require an energy engineer/scientist who is fully knowledgeable of existing and potential energy sources and the limitations of these sources within the municipality. These energy sources include electricity, natural gas, fuel oil and other heating oils, transportation fuels, renewable energy sources, and potential existing waste energy (heat) sources.
- The project team will require an energy engineer/scientist who can compile the existing aspects of energy utilization with the municipality as well as projected potential future uses given projected growth scenarios. The energy utilization analysis will include residential, commercial, institutional, industrial, transportation and other sectors.
- The project team will require an urban planner who understands existing and likely future growth in the municipality and environmental engineers or scientists who are versed in the latest sustainable development frameworks and their applications.
- The project team will require specific analysis in several subject areas and would benefit from the expertise of an economist (for price forecasts), regulatory specialist (to evaluate barriers and recommend solutions), and support for public consultation and education.
- The project team will need to demonstrate experience in the development of community energy plans.
- The proposal shall clearly demonstrate how the consultant will approach the various issues of the CEP based upon the qualifications of the proposed team. An organizational chart and manpower loading matrix shall be provided to demonstrate the specific technical resources proposed for the project; the manpower allocation matrix shall be broken down by each major project task.

6 Contractual Arrangements

[This section will include the standard contract items that a municipal unit will enter into with consultants]