

REQUEST FOR PROPOSALS

CONDUCT A NEEDS ASSESSMENT AND DEVELOP A BUSINESS PLAN FOR A NEW EASTERN AREA WELLNESS CENTRE

For SeaRoots Alliance Incorporated

Souris, Prince Edward Island

Request for Proposal Released: February 24, 2025

Notification of Intent to Bid: March 14, 2025, 4pm ADT

Deadline for submission of Proposals: March 21, 2025, 4pm ADT

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PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

1.1 Invitation to Proponents

This Request for Proposals (the “RFP”) is an invitation by SeaRoots Alliance Incorporated (referred to as “SRA” throughout document) to prospective Proponents to submit proposals to Conduct a Needs Assessment and Develop a Business Plan for an Eastern Area Wellness Centre to be located within the Town of Souris, Prince Edward Island.

Proponents should carefully read this RFP to thoroughly understand the requirements of SRA. Proposals which fail to respond to the procedural and content requirements of this RFP may be rejected.

Proponents interested in this project must include a response for all the details requested in this document. The information provided in this document is intended to provide a general overview of the work required. Proponents should include in their proposal any value-added elements that they, in their experience in similar projects, would seek to include in their proposal.

1.2 Background and Vision of SeaRoots Alliance Incorporated

SRA is a provincially incorporated non-profit organization with the vision to create a wellness centre that is accessible and inclusive, serving families and individuals of all ages that promotes recreation, learning, and community.

SRA’s focus is to improve community members' lives recreationally, socially, and educationally. At a time when the province of Prince Edward Island is in a health care crisis, SRA believes this is an opportunity to be proactive to support community members with their overall wellness. A wellness centre will have endless opportunities for community members to help support them with not only their physical health but also their mental well-being. The wellness centre is based on three pillars - Community, Recreation, and Learning – which will provide the community members the opportunity to flourish and grow in multiple ways.

The vision of SRA is a facility which can act as a hub for the region.

Pillar #1 Community:

- Provide gathering spaces for community members.
- Provide the opportunity for space for after school care for kids and day camps.
- Provide an EMO/Reception space.
- Provide community groups like seniors and families a Family Resource Centre with space for events.

Pillar #2 Recreation:

- Provide two ice surfaces to allow for more curling time for community members, and additional ice time for hockey and ringette associations to support games, practices, development camps, and power skating.
- Provide a walking track for a safe and inclusive space for community members of all ages.
- Provide space for health care professionals to provide programming and rehab services.
- Provide a flexible multi-use space for programming such as pickleball, indoor soccer, and baseball, for seniors and youth.

Pillar #3 Learning:

- Provide a larger, more accessible space for the Library, for additional programming and services, by moving the Town of Souris Library to new space.
- Provide learning hub spaces within the facility, particularly within the library, to grant opportunities for residents of all ages to gather to share knowledge and learn new skills.
- Provide access to internet and computers to help residents access information, support and even online healthcare opportunities.

Community members in eastern Prince Edward Island live with many conditions that improve with regular activity and socialization. The winter months create a huge barrier for our community to engage in these activities. However, this barrier would be eliminated with a facility that encourages children and adults alike to participate in activities that promote health and wellbeing. A wellness centre will provide opportunities for year-round recreation, learning, and community connection. Additionally, access to these opportunities will also support the recruitment and retention of skilled tradespeople and healthcare professionals as they seek communities to live and work within that enable healthy development of their families.

Enhanced community services of the Library, learning hub, multi-functional reception and meeting space and the various recreational and sport elements would work together to foster an active hub that is more than the sum of its parts. A facility of this magnitude allows for community members from the entire Kings County area to access a facility where they can learn, play, and connect.

This project has been formally endorsed through written letters of support from the following municipal governments:

- Town of Souris
- Rural Municipality of Eastern Kings
- Rural Municipality of Souris West
- Rural Municipality of Annadale Little Pond Howe Bay

Additionally, letters of support or formal support through a motion have been provided by the following stakeholders:

- Souris Ringette Association
- Souris Minor Hockey Association
- Souris Harbour Authority
- Eastern Kings Sportsplex
- Eastern Kings Fitness Incorporation
- Souris Public Library
- Souris Curling Club

1.3 Realizing SRA's Vision

Currently, the Eastern Kings Sportsplex serves some of the recreation needs for the area. However, it lacks the space required to fully support the three pillars of SRA's vision.

SRA has commissioned a Schematic Design Report from SableArc Studios for a potential new building. This concept design provides a realistic interpretation of the requirements to progress the overall vision of this project. The design is also driven by sustainable designs that would see the possibility of a "Net

Zero” facility through the use of advanced architectural building systems, geothermal energy, and the generation of on-site electricity through roof-mounted solar panels.

Prospective Proponents are encouraged to gain access to this document to inform the development of their proposal by contacting the RFP Contact identified in this RFP.

1.4 Project Objectives

The objectives of this project are to:

- 1) Conduct a needs assessment to ensure a well-documented need for the Eastern Area Wellness Centre to facilitate SRA in pursuing next steps in obtaining needed approvals, commitments and funding with key stakeholders and partners.
- 2) Develop a comprehensive business plan for the Eastern Area Wellness Centre, including identifying potential funding sources and financial strategies.
 - a. Examine various options for a new facility to provide forecasted financials to help determine how to best meet community needs while achieving sustainability.
 - b. Identify potential site locations for a new facility.
 - c. As part of business planning, the Proponent should identify potential options for the disposition of the Eastern Kings Sportsplex building.

1.5 Scope of Work

The Proponent will conduct a needs assessment and develop a comprehensive business plan to establish the viability of establishing the Eastern Area Wellness Centre. The study will examine various versions of a new wellness facility and provide forecasted financials to help determine that the recommended option meets the community needs while achieving sustainability.

To achieve the project objectives as noted in Section 1.4, it is expected the successful Proponent will at minimum include in the work under the contract the following:

- **Needs assessment**
 - Market demand.
 - Growth trends for PEI as well as the impact a facility will have on potential growth in the Kings County area
 - Overall age demographic report for the Kings County area
 - Household numbers
 - Existing facilities: Describe, including: condition, size adequacy, suitability for continued use, and other pertinent information. Include accessibility concerns/noncompliant issues, and usage of facilities. Include any structural evaluation reports, etc.
 - Identify potential options for a wellness centre.
 - Review of concept design as an option for a new facility, and identify any needed modifications to ensure future sustainability
 - Identify potential site locations for the new facility.
 - Identify how many acres are required
 - Identify any required zoning changes required
 - Identify potential challenges associated with each potential option and recommend well-thought-out solutions
 - Consult with stakeholders on any alternative identified
 - Identify the technically preferred alternative

- Refine cost estimates to prepare a Class C Cost Estimate for a new facility.
- Identify potential options for the disposition of the Eastern Kings Sportsplex building (repurpose for another use, sell, etc.)
- **Ownership/Management/Governance Structure**
 - Outline Town of Souris and surrounding municipalities/areas contributions and potential ownership/management/governance model of the wellness centre.
 - Create plan to run the facility collaboratively, including governance structure and day to day operations.
 - Consultation with SRA and community partners
 - Create a draft Governance Plan to define governance structure, responsibilities, authorities, accountabilities, and communications, as well as change and risk management protocols.
- **Developing a comprehensive business plan**
 - For each identified option prepare Operational Projections – Forecasted cost to run the facility versus the revenue reasonably expected.
 - Include not only current intake from the present facility but also capturing potential for growth.
 - Commit to meeting with SRA for consultation and input on potential revenue streams.
 - Compare and analyze income and rental usages and opportunities from other facilities.
 - Examine multiple scenarios to achieve long-term fiscal sustainability.
 - Identify key aspects of the financial model that would be most impacted by changes in the size and capacity of the facility and the ultimate sustainability of the project.
 - How eco-friendly design and systems and green energy solutions can impact operational costs
- **Stakeholder Engagement**
 - The Proponent will be responsible for conducting stakeholder consultations and preparation of communications as necessary to complete the project.
 - Consultation with potential funding partners
 - Consultation with other similar facilities to get a realistic understanding of operational expenses
 - Consultation with Town of Souris and other local eastern Kings municipalities
 - Consultation with the SRA Board
- **Risk Analysis**
 - Identify risks, risk level, and mitigation strategies that are relevant to this project. Risks are to be assessed relative to the project complexity, readiness, sensitivity, and operational viability.
- **Reporting**
 - The Proponent will prepare a report (or reports) during the project on Information gathered on issues, ideas, opportunities, including but not limited to:
 - Assessment of need
 - Alternatives identified

- Business Plan
 - Provide a schedule for regular project meetings with SRA and reports on findings.

1.6 RFP Contact

For the purposes of this process, the “RFP Contact” on behalf of SeaRoots Alliance shall be:

Erin Boyle
 Procurement Agent
 SeaRoots Alliance
admin@searoots.ca

Information gathered from other sources, including members of the Board of Directors of SeaRoots Alliance Incorporated, should not be considered official and should not be relied upon in developing a response to this RFP.

Proponents and their representatives are not permitted to contact any other person other than the RFP Contact concerning this RFP. Failure to adhere to this rule may result in the disqualification of the Proponent and the rejection of the Proponent’s proposal.

1.7 RFP Timetable

Below is the approximate schedule that is expected to be followed for this RFP. However, this may be subject to change and is therefore presented primarily for guidance:

Deadlines	
Issue Date of RFP	February 24, 2025
Notification of Intent to Bid	March 14, 2025
Question Deadline	March 10, 2025 at 4PM ADT
Addendum Issued	March 13, 2025
Proposal Submission Deadline	March 21, 2025 at 4PM ADT
Review of Proposals	March 24 - March 28, 2025
Award of Contract	Week of March 31, 2025
Initial Meeting with Contractor	Week of April 7, 2025
Project Completion	June 15, 2025

1.8 Submission of Proposals

1.8.1 Proposals to be submitted to:

Erin Boyle
 Procurement Agent
 SeaRoots Alliance
rfp@searoots.ca

1.8.2 Submission Process for Proposals:

- A notification of intent to bid **must** be emailed to the RFP Contact **by email no later than March 14, 2025.**

- Proponents interested in reviewing the SableArc Schematic Design to prepare their bid should contact the Procurement Agent noted in Section 1.8.1 to access a copy.
- Responses to questions from Proponents will be compiled into an Addendum and sent to those Proponents who have submitted a notification of intent to bid.
- **Proposals must be received by email before 4:00PM ADT on March 21, 2025** (see section 1.7 RFP Timetable).
- Late proposals will not be accepted.
- Proponents should submit their proposal to the RFP Contact by email containing **one (1) electronic copy saved as a Portable Document Format (PDF)**. The email subject line should read: "Proposal for Eastern Area Wellness Centre Study_(*firm name*)".
- Proponents should not submit other marketing material with their bid.

1.8.3 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in any Addenda.

1.8.4 Proponent Responsibilities

- The proposal must be signed by the person(s) authorized to sign on behalf of the Proponent or company and binds the Proponent to the statements and representations made in the proposal.
- The Proponent is entitled to amend or withdraw its proposal at any time before the proposal submission deadline.
- It is the Proponent's responsibility to ensure that their submission is complete and is delivered to the SeaRoots Alliance Incorporated by the date and time indicated.

1.9 RFP Submission Requirements

Proposals should be detailed enough to demonstrate how the Proponent's expertise, staff and resources best meets the needs of SRA as described in this RFP. Proposals should be developed with the following sections.

A) Proposal Cover Page: Include the name of the proposing organization and contact information.

B) Executive Summary: Provide a concise overview of the proposed approach to conducting this project, highlighting key objectives, methodologies, and expected outcomes.

C) Understanding of the Project: Demonstrate a comprehensive understanding of the scope and requirements of the needs assessment and development of the business plan, as outlined in 1.5 Scope of Work. Clearly articulate how the proposed approach aligns with SRA's strategic vision and goals for the development of the Eastern Area Wellness Centre.

D) Approach and Methodology: Describe the proposed methodologies and techniques for conducting the work as outlined in the Scope of Work, including research approaches, data collection methods, stakeholder engagement and communication strategies, and analytical frameworks. Identify any value-added approaches or methodology to be provided by the team.

E) Work Plan: Provide a detailed work plan outlining the proposed timeline, milestones, and deliverables for each phase of the work. Clearly identify key activities, responsible personnel, and dependencies, including any project risks and risk mitigation approaches.

F) Experience and Qualifications: Present detailed information on the proponent's experience and qualifications relevant to similar projects.

G) Project Team: Include biographies of key team members proposed to work on the project. Detail their relevant experience, qualifications, and roles in the project. Emphasize relevant expertise.

H) References: Include contact information for a minimum of three (3) references from similar projects, including a brief description of how the reference is relevant to this project. Proponents may also provide additional testimonials or reference letters that attest to the proposing organization's credibility, reliability, and quality of work.

I) Budget: Present a comprehensive and itemized budget for the work, covering all anticipated costs, including personnel, travel, materials, and contingencies. Justify the proposed costs and provide transparency in budget allocation. All applicable taxes are to be identified. Fees are to be quoted in Canadian funds and are to remain firm and irrevocable for a period of 90 days after the official proposal submission deadline indicated in this RFP.

J) Appendices: Any additional documents or supplementary materials relevant to the proposal, such as project samples, certifications, team resumes, or endorsements, may be included as appendices.

1.10 Acceptance or Rejection

SRA reserves the right to waive any informality in proposals, to accept any proposal, and to reject any or all proposals should it be deemed in the best interest of SRA to do so. Proposals may be held by SRA for a period not to exceed thirty (30) days from the date of the opening of proposals for the purpose of reviewing proposals and investigating the qualifications of the Applicants before the award of a contract.

Should SRA not receive any proposal satisfactory to SRA in its sole and absolute discretion, SRA reserves the right to not proceed with the contract, re-advertise the Request for Proposals or negotiate a contract for the whole or any part of the Project with any one or more persons whatsoever, including one or more of the Proponents.

1.11 Confidentiality

All correspondence, documentation, and information provided by SRA to any Proponent in connection with, or arising out of this Request for Proposal or the acceptance of any proposal:

- remains the property of SRA.
- must be treated as confidential.
- must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent contract.

1.12 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with SRA, if any. SRA will not be liable to any Proponent for any claims, whether for costs, expenses, damages, or losses incurred by the

Proponent in preparing its proposal, loss of anticipated profit in connection with any final contract, or any other matter whatsoever.

1.13 Conflict of Interest

In its proposal, the Proponent must disclose any potential conflict of interest that might compromise the performance of the work. If such a conflict of interest does exist, SRA may, at its discretion, refuse to consider the proposal.

1.14 No Lobbying

A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any representative of SRA, including members of the RFP evaluation committee, may result in disqualification of the Proponent.

1.15 Liability for Errors

While SRA has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by SRA, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

1.16 Resource Commitments

The successful Proponent must make available the appropriately skilled workers, consultants, or subcontractors, as appropriate, to carry out the contract. These resources must be available on a dedicated basis, as required, to carry out the contract with due care, skill, and efficiency. The selected Proponent will ensure that staff assigned to work on this project have the necessary education, licenses, and certifications where necessary.

1.17 Subcontractors

SRA will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the contract. SRA will enter into a contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed subcontractors, if applicable.

All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal. A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests may, in SRA's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor, or representative of SRA involved in preparation of the RFP, participating on the evaluation committee or in the administration of the contract.

If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the RFP Contact prior to submitting a proposal. By submitting a proposal,

the Proponent represents that it is not aware of any circumstances that that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

1.18 Negotiations

SRA may award a contract on the basis of initial proposals received, without further discussions. Therefore, each proposal should contain the Proponent's best terms and information, including all required documentation, as listed in the RFP. SRA reserves the right to enter into discussion or negotiations with the selected Proponent. If SRA and the selected Proponent cannot negotiate a satisfactory contract, SRA may, at its sole discretion, terminate negotiations and begin negotiations with the next selected Proponent and continue with the process until a satisfactory contract is negotiated. No Proponent shall have any rights against SRA arising from such negotiations.

1.19 Intellectual Property

SRA will retain the intellectual property rights including patents, copyright, trademark, concept design and trade secrets in any deliverable product or product developed through this contract.

1.20 Insurance

The successful Proponent shall be required to maintain at its own expense, during the term of contract, appropriate levels of Commercial General Liability Insurance, Automobile Insurance for owned/leased vehicles, and Professional Liability Insurance and provide proof of said insurance in a form acceptable to SRA prior to commencement of work under a contract. All such insurance policies shall stay in force and not be amended, cancelled or allowed to lapse during the delivery of goods and services under this contract.

PART 2 – EVALUATION OF PROPOSALS

2.1 Mandatory Professional Requirements

- Demonstrated understanding of arena/wellness centre studies, planning and design, with experience in recreation infrastructure.
- Experience working within a set budget.
- Experience in community consultation and ability to facilitate the process and discussion.
- Demonstrated ability to work successfully with multiple stakeholders, organizations and committees.

2.2 Evaluation Process

All submissions received prior to closing will be evaluated by an evaluation committee selected by the SRA Board of Directors, which will include members from the Board of Directors and key stakeholders for the Wellness Centre.

SRA reserves the right to perform any of the following and to take the information obtained into account in evaluating a Proposal including the right to:

- Seek clarification or verify information provided by the Proponent with respect to this RFP.

- Contact any or all the references supplied by the Proponent to verify any information or data submitted by the Proponent and to obtain information about past performance.
- Request additional detail(s) on any element(s).

SRA reserves the right to shortlist firms for further evaluation through interviews which may alter the final scoring results. SRA reserves the right to not necessarily accept the lowest bid, but to accept the bid which best fits the evaluation criteria at its sole discretion.

2.3 Evaluation Criteria

Proposals will be assessed based on the following weighted criteria:

Understanding of the Project (35%) Proponents should demonstrate a comprehensive grasp of the project's scope and requirements and a well thought out approach and methodology that will lead to success. This includes:

- Clearly articulating an understanding of overall scope and the objectives of the project and how the proposed approach will meet the stated need. Note any challenges that may exist.
- Providing sufficient detail to give assurance the methodology is well thought out and will lead to achieving project objectives.
- Providing a detailed workplan and timeline for the project including task identification, project milestones, deliverables and identification of time involvement by project personnel and SeaRoots Alliance Incorporated representatives.
- Identifying considerations which have not been included in the scope of work, but based on past experiences, should be incorporated.
- Identifying any project risks and proposed mitigation strategies.

Experience with Similar Projects (15%) Proponents are expected to showcase their experience in conducting similar projects. This entails:

- Providing detailed case studies or project descriptions of similar studies conducted, especially those in comparable geographic contexts.
- Demonstrating successful completion of past needs assessments and business plans, highlighting achievements in communities with characteristics akin to Eastern PEI.
- Sharing insights and lessons learned from prior projects that are relevant to ensuring the success of the project.

Qualifications and Experience of Assigned Staff (15%) The expertise of the proposed project team is crucial for the successful execution of this project. Proposals must:

- Present detailed information on the qualifications, roles, and relevant experience of key team members, emphasizing skills pertinent to the scope of work.
- Articulate how each team member's expertise contributes to the overall success of the project, ensuring alignment with the project's objectives and requirements.

Proposed Budget (20%) Transparency and cost-effectiveness are paramount considerations for SRA. Proposals should:

- Provide a comprehensive and itemized budget that covers all aspects of the project, including research, analysis, stakeholder engagement, and reporting and provides hourly rates and level of effort.
- Justify the proposed costs by demonstrating value for money and outlining any innovative approaches to cost savings without compromising quality.

- Clearly outline any assumptions or conditions underlying the budget estimates to ensure SRA's understanding and agreement.

Quality of References (15%) Strong references play a vital role in assessing the credibility and reliability of applicants. Proposals should include:

- Contact information for references from similar work conducted within the past five years, preferably in the context of similar projects.
- Testimonials or reference letters attest to the Proponents' reliability, quality of work, and ability to adhere to budget and timelines.
- Any awards, recognitions, or formal evaluations that highlight the applicant's excellence in conducting work on similar projects.

By addressing these selection criteria in their proposals, applicants will demonstrate their capability and readiness to fulfill SRA's needs for the project, ensuring alignment with the project's objectives and requirements outlined in the RFP.