



REQUEST FOR PROPOSALS:

REGIONAL CENTRE URBAN DESIGN STUDY

RFP#: 05-073

Closing January 19, 2006 @ 4:30 p.m.

A



Project

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1. INTRODUCTION

HRM is currently preparing a Regional Plan that establishes a vision for HRM, identifies growth strategies, infrastructure requirements, and broad policy directions. It is expected that the Draft Regional Plan will be adopted in early 2006. The Regional Plan identifies the Regional Centre as an area of intensification and focused development. Vacant and under-utilized land, waterfront land, and abutting District Centres will easily accommodate the 21,000 new people and the associated 15,000 new housing units projected for the Regional Centre over the next twenty-five years. As part of the current Regional Plan process, Council and Staff have identified the need for an Urban Design Study for the Regional Centre. The Urban Design Study will deal with the nature, intensity, and quality of development in both the public and private realms. It will build upon other recently completed work regarding the design of public areas in the Capital District, and will be the vehicle that gives physical form to the policies of the Regional Plan within the Regional Centre.

While the Regional Plan is still in preparation, the clear direction is toward the concentration of development in appropriate locations (“Centres”) that will generally be connected by transportation corridors. The importance of Urban Design as a mechanism for economic development is recognized in the Regional Plan’s Economic policies, and its importance as a cultural asset is recognized in the Heritage and Culture policies. The Regional Centre Urban Design Study is the first of a series of Urban Design Plans for the various Centres within HRM, and its creation and implementation will be replicated in other HRM Centres to further develop the urban structure of the entire region, engaging residents in shaping the future of their communities and their municipality.

2. OBJECTIVE

Halifax Regional Municipality is seeking proposals from Urban Design teams of the highest professional calibre for the preparation of a comprehensive urban design study for the Regional Centre. The ideal team would consist of a principal firm with extensive urban design experience at the national or international level collaborating with a local firm possessing direct HRM knowledge and experience.

The Regional Centre Urban Design Study must ensure that development is carefully considered toward creating living and working environments of the highest possible quality. It must also recognize that adjacent, stable neighbourhoods and heritage resources must be protected and reinforced. While this is not a holistic community planning exercise for the Regional Centre and its neighbourhoods, it will foster well-designed buildings and streetscapes through the creation of new policies and tools including design guidelines, processes and incentives. It is proposed that the Regional Centre Urban Design Study will be produced over an eighteen-month study period.

The objective of this Request for Proposal is to identify the best-qualified team for this initiative.

3. STUDY AREA

HRM is comprised of many different communities spread over nearly 6,000 square kilometres (1.5 million acres), and each community has its own unique character, needs and aspirations. However, the economic, cultural and social hub of the city, as well as the greatest concentration of population and employment is the Regional Centre. It is home to 97,000 people, 50,000 households, and 56% of HRM's total employment (107,000 jobs). The Regional Centre is HRM's urban core and covers approximately 32 square kilometres (8,000 acres). It is comprised of the Halifax Peninsula, the area of Dartmouth enclosed by the Circumferential Highway (Hwy. 111), as well as the main transportation/transit corridors feeding the Regional Centre. In Halifax these corridors include Barrington Street, Robie Street, Bayers Road, North Street and Quinpool Road, and in Dartmouth they include Victoria Road, Windmill Road, Portland Street and Pleasant Street. (See Appendix A: Regional Centre Map.) An important subset of the Regional Centre is the Capital District, which has been defined to include Downtown Halifax and Downtown Dartmouth, as well as the Spring Garden Road, Quinpool Road, and Gottingen Street commercial districts. (See Appendix B: Capital District Map.)

4. BACKGROUND

Halifax Regional Municipality: Halifax Regional Municipality (HRM) is the Capital of Nova Scotia and the centre of economic growth in Atlantic Canada. It is home to a large number of regional and national corporations, the East Coast headquarters and port for the Department of National Defence, host to half a dozen universities and the region's major health care complex, a thriving arts and entertainment industry, and a growing oil and gas industry. HRM is home to 360,000 people, boasts a 700 million dollar tourism industry, and is the cultural heart of the Atlantic Region. When these attributes are combined with our beautiful natural environment and high quality of life assets, the City's emergence as one of the next "great small cities" becomes evident. In fact, the Halifax Regional Municipality is increasingly being recognized as a hidden gem within Canada and North America. As such, it must be maintained and reinforced as the region's core in order to achieve sustainable growth for all of HRM.

Future Growth: The Draft Regional Plan calls for a balanced approach to future growth shared between urban, suburban, and rural communities. HRM-wide, the Regional Plan anticipates the potential of about 59,000 new housing units to be built (equal to a population of about 85,000) over the next 25 years. About half of this growth will occur in the serviced suburban areas, and a quarter of this growth will occur in the rural communities. The remaining quarter of this growth will occur within the Regional Centre (15,000 households, 21,000 people). Of the Regional Centre's share of future growth, one half will occur within the District Centres at the edge of the Regional Centre, and one half will be directed toward the vacant and under-utilized lands within the urban core, including sites along the Halifax Waterfront and in Downtown Dartmouth. The Regional Centre Urban Design Study will play a critical role in ensuring that the new construction resulting from this future growth will be of the high possible quality.

Transportation: The Regional Plan identifies a settlement pattern that reflects the necessary interrelation of land use and transportation. Because the majority of future population growth will occur off the peninsula, the commensurate increase in vehicle trips to downtown employment generators through the peninsula's limited access points will increase. The Regional Plan recognizes this with a strong traffic management vision that includes the improvement and expansion of the existing transportation infrastructure, the encouragement of alternate means of transportation, and pricing signals to influence decision making on the mode of transportation chosen. The increased use of public transportation (buses, ferries, car-pooling) and active transit options (walking, bicycling) are therefore fundamental to the Plan. The settlement plan being encouraged is transit-oriented, mixed use, compact, walkable and with clearly defined centres of activity. The Regional Centre Urban Design Study must play a leadership role in implementing these transportation strategies that will be emulated in the other Centres in the future.

Community Design: The Regional Plan places great emphasis on community design approaches to manage future growth and infill in the Regional Centre, as well as in other Centres. By encouraging inviting streetscapes, by protecting heritage assets and natural areas, and by incorporating universal accessibility design standards, the Regional Plan underscores the critical role of good community design in promoting high quality of life. Within the Regional Centre, most of the projected development will occur on opportunity sites, identified in the Regional Planning process, on which a mixed-use form of development can be infilled. This will consist of high-density residential, retail, office and civic uses focused around high-order transit stations. Also important to community design initiatives within the Regional Centre will be a strategy to ensure that the City continues to enjoy a stable 'town and gown' relationship as off-campus housing demand increases and enrolment grows.

Public Spaces: Important to the quality of urban life is the provision abundant open space and public areas (especially in light of the Regional Centre's expected population growth) and the Urban Design Study must establish clear and broadly accepted expectations in this regard. Historic sites must be protected, mechanisms for the provision of public art should be examined, existing viewplanes must be preserved, efforts to 'green' the city should be continued with renewed vigour, locations for future parks and public plazas should be identified, and importantly, connections between all of these elements must be established and protected. This effort will build on previous work, particularly the three-volume Capital District Urban Design Project completed in 2004.

5. DEFINITION OF URBAN DESIGN

Urban Design sets the stage for our daily lives, and when done well it seamlessly joins the physical environments of public and private development. It also addresses land use, density, building form, materials, and quality of development. In keeping with the overall concept of form-based planning espoused in the Draft Regional Plan, the Regional Centre Urban Design Study must embrace concepts that will make the area a desirable one in which to live and work.

The street is the basic building block and organizing feature in developing, describing, and implementing Urban Design. Streets define the continuity of public areas, and street types establish the relationship between public and private interests, between buildings and adjacent public spaces, and set the balance between pedestrian and vehicular movement. A clear concept of street types serves as the basis of defining character areas and precincts, and reinforces the nature and values of stable residential neighbourhoods.

The Regional Centre Urban Design Study will articulate specific guidelines and implementation tools toward ensuring high quality development and vibrant public spaces, and will be an important means to realize the policies of the Regional Plan. In broad strokes, the Regional Plan outlines the places where development should be focused and the corridors where movement (transportation) should be directed. However the Regional Centre Urban Design Study will focus on the specific tools that need to be developed to implement the Regional Plan, and will consider: necessary changes to existing policies, bylaws, and Community Plans; the introduction of new design guidelines; recommendations for specific public improvements; refinement of the existing Capital District boundary, and; the introduction of incentives to the private sector for Urban Design leadership.

With the exciting changes precipitated by the Regional Plan, now is the moment for citizens to determine collectively what these policies mean for the Regional Centre, and how this Urban Design Study will foster good design and integrated community-based planning.

6. PUBLIC PARTICIPATION

Extensive public involvement will be an essential component of developing HRM's Regional Centre Urban Design Study. While the study area is restricted to the Regional Centre, residents from surrounding neighbourhoods, as well as citizens from elsewhere within the greater Region who may work in or visit the Regional Centre should be engaged in the discussion and development of ideas for Urban Design. Input should be broadly sought from the many existing local groups, organizations, heritage advisory groups, businesses, tourism associations, development interests, design professionals, and property owning stakeholders.

The entire eighteen-month process should be inclusive, open, and transparent. Numerous formal and informal opportunities should exist for those interested to follow the process, contribute to it, and discuss and debate its ideas. Regular meetings and newsletters will inform the public about the progress of the Regional Centre Urban Design Study. The Urban Design Planning process will be integrated with other initiatives, and existing opportunities and mechanisms for public information (such as the Regional Planning and Capital District newsletters and public meetings, as well as existing research) should be maximized. The approach is community-based with staff and the consultant team working closely with citizens and the development community to build awareness and understanding of Urban Design opportunities.

In cooperation with the Project Steering Committee (comprised of representatives of various pertinent HRM departments and representatives of ACOA and the Province in their capacity as

funding partners), the Urban Design consulting team will lead the public participation component of the Urban Design Study, which will include public information sessions, forums for public comment, and participatory design workshops. This open process will foster community ownership of the ideas, facilitate engagement in implementation, help to maintain stable neighbourhoods, and enhance civic pride. It will also present an approach to community involvement in Urban Design issues that can be replicated in other areas of HRM in the future.

The consultant team will also explore the merits of the establishment, and composition, of a citizen-based Project Advisory Committee toward ensuring public and stakeholder input is incorporated in the Project.

7. PROJECT DELIVERABLES

The ultimate goal of this study is to create an Urban Design strategy for the Regional Centre that results in an easily understandable and logical urban form, a visually appealing and human-scaled public realm, and an enhanced sense community pride and proprietorship. The importance of visual communication must be reinforced both in the Urban Design Study itself, and in the tools for community consultation; legible drawings, compelling graphics, comprehensible maps, and generally visually attractive materials will be used. By the end of the eighteen-month study period, HRM and the consultant team will have developed a comprehensive Regional Centre Urban Design Study consisting of the following sections:

7.1 Urban Design Principles

Based on public consultation and the Capital District Urban Design Project work completed to date, the Urban Design principles will articulate the values and aspirations of HRM citizens as they relate to our physical surroundings. They will define the implementation tools to be employed in the achievement of optimal Urban Design in the development of private sites, public areas, and public infrastructure.

7.2 Urban Design Analysis

7.2.1 Urban Design Infrastructure:

The Urban Design Study will identify significant assets and elements in the Regional Centre, with a focus on the Capital District, and reinforce the need for connections amongst them. This “infrastructure” will include such assets as: major transportation corridors and links (per the Regional Plan), open spaces, public facilities, events facilities, commercial corridors, and viewplanes.

7.2.2 Street Typology:

The Urban Design Study will outline the hierarchy and type of streets in the study area, and will emphasize the important role of streets in good Urban Design. The Plan will develop a vocabulary for streets, including typology and images. This will help define

and promote stable neighbourhoods, character areas, precincts, and other important concepts needed for continuity, legibility, and coherence in the Regional Centre.

7.2.3 Residential Infill Case Studies:

The demand for up to 15,000 dwelling units within the Regional Centre over the next twenty-five years is projected by the Regional Plan. This infill will occur largely on vacant and under-utilized land within the study area. Working with the Capital District staff, the Urban Design team will identify several neighbourhoods (or residential “precincts”) to serve as case studies. The number and location of these precincts is flexible, however they would ideally address precincts of low, medium and high residential density where development pressures are present.

Through a process of Urban Design analysis and public consultation, precinct-specific design guidelines and policy/bylaw changes will be proposed. While the Regional Centre Urban Design Study is not intended to provide design guidelines for the entire Regional Centre, these case studies will serve as a model for residential infill guidelines elsewhere in the Regional Centre and beyond.

7.2.4 Design of Opportunity Sites

It is important that the Regional Centre Urban Design Study not only guide the design of new buildings and public spaces, but also that it improve existing conditions. As previously stated, the Regional Centre Urban Design Study will not include a holistic community planning process. Instead, it will identify and address broad design issues within the study area by means of the identification of Opportunity Sites. As part of the Regional Plan process, the Regional Planning staff has identified in excess of fifty sites within the study area that are either vacant or have the potential for redevelopment. The Urban Design consultant team will work with the Capital District staff during the study period on the identification of specific Opportunity Sites of both public and private ownership, which will be selected based on their disconnect from the urban street typology and fabric.

The Opportunity Site studies will be developed to provide concise urban design guidelines and implementations plans. These studies will include conceptual design of the sites as a demonstration of the principals being put forth. The intention is that once the Urban Design Study has been adopted, the publicly and privately owned Opportunity Sites will be ready for build-out, under separate tender, in accordance with the design guidelines and implementation plans.

7.3 Implementation Strategy

The development of tools, incentives, and guidelines is critical to the Regional Centre Urban Design Study. However to ensure that the Plan is meaningfully implemented (and will have an impact on the ground), it is necessary that an approach to implementation be developed that outlines an effective phasing-in of the tools. This

Implementation Strategy will ensure that Plan will not be put on a shelf, but will be used mindfully every day in decision-making. The Implementation Strategy should include:

7.3.1 Priorities:

Prioritize the Plan's ideas with emphasis on the 'front-end' ideas, with a phased approach achieving the remaining ideas.

7.3.2 Budget:

Include an approximate budget for future implementation of the ideas, focusing detailed budget items on the first steps.

7.3.3 Schedule:

Include a schedule for implementation of the Regional Centre Urban Design Study once the study period is completed and the final product has been delivered to HRM.

7.3.4 Urban Design Study Evaluation:

Develop a set of indicators based on two scales: indicators of the success of individual projects, and indicators of the effect of the Urban Design Study as a whole.

7.3.5 Policy and Bylaw Changes:

The highly subjective nature of the current Development Agreement process often leads to decision appeals. The Regional Centre Urban Design Study should include proposals for policy and legislative changes and/or requirements needed for proper implementation of the ideas (including potential incentives or performance zoning) that alleviates this situation. Other potential changes may include a revision of the Capital District boundary to capture important institutions such as downtown hospitals, universities, and other important economic drivers.

7.3.6 Organizational Changes:

Proposed organizational and decision-making changes at the three levels of government.

7.3.7 Future Step/Action Plans:

The Implementation Strategy should include ideas on how to keep momentum going "past the project" so that the Urban Design Study does not languish.

7.4 Implementation Tools

Examples of the Implementation Tools may include:

7.4.1 Public Improvement Design Handbook:

HRM and other levels of government are owners responsible for numerous public buildings, public spaces, and parks. This handbook would build on the Capital District

Urban Design Project, and other previous studies, and will guide government landowners on public works and capital project expenditures that will set high standards of design as an example for private development.

7.4.2 Development Design Handbook:

In order to have a common and consistent language and understanding of the Urban Design requirements for current and new developments throughout the Regional Centre, a handbook should be developed. This handbook will be valuable for developers, consultants, landowners, planners, and most importantly, the general public. Beyond functioning as a powerful reference tool, it will also be used as an educational tool for building capacity regarding Urban Design amongst HRM staff.

7.4.3 Design Guidelines:

The Implementation Strategy will include Design Guidelines for priority districts within the study area that take into account such considerations as: public space; pedestrian and vehicular movement; analysis of significant views; identification of significant gateways; landmarks and historic districts; building design; relationship of buildings to open space; building height and envelope criteria; appropriate locations and criteria for tall buildings; integration of parking, integration of access for service vehicles; pedestrian and site lighting; landscaping including site furnishings, and environmental impact performance criteria (wind, shadowing, etc.). The design guidelines will address development at all scales within the Regional Centre.

7.4.4 Residential Infill Case Studies and Development of Opportunity Sites:

The Residential Infill Case Studies discussed in 7.2.3 will be important Implementation Tools by way of demonstration. The Urban Design analysis and the proposed design guidelines and bylaw amendments that result will be examples for future residential infill development.

Because the Opportunity Sites described in 7.2.4 will ultimately be built out, they have the potential to be among the most important tool in advancing the Urban Design agenda in the Regional Centre and beyond. The method by which these studies takes place should be collaborative in approach, and should be clearly documented, step-by-step, so that the effort can be replicated at other sites in the future.

7.4.5 Municipal Planning Policy/Bylaw Changes:

For the fundamental design objectives that result from the study, it may be most efficient to make broad and far-reaching Municipal Policy Plan and Bylaw changes. These proposed changes might include incentives and performance zoning, and should be included in the Implementation Tools. These changes could form the basis of a new policy and planning framework for the Capital District.

7.4.6 *Municipal Planning and Design Review Process:*

The Implementation Strategy will suggest changes to the current procedures used in HRM regarding the clarity of the decision-making process for new developments, and the Urban Design elements of those projects. Ideas about simplifying and integrating organizational structures (such as inter-departmental committees, and other mechanisms that capture the ideas, issues, and aspirations of community members) will be essential.

7.4.7 *Capacity Building Strategy:*

One of the goals of the Regional Centre Urban Design Study (building upon the policies of the Regional Plan) is to foster an Urban Design Culture in HRM. This will be a new concept for many, and some education and familiarization will be necessary. The name given to this process is Capacity Building, and the Implementation Tools should describe the process by which it is undertaken, complete with a timeline. The audience will be HRM staff, members of the municipal and provincial government, the private development industry including design professionals, and the general public. The Capacity Building process should convey ideas that are consistent with existing research (i.e. the Regional Plan, the Capital District Urban Design Project) and should add any new ideas resulting from the creation of the Regional Centre Urban Design Study. This process should contemplate a design-based outreach program that will keep Urban Design on the daily agenda of the people of HRM, thereby furthering the concept that Urban Design is not the exclusive realm of experts and designers, but that it is community-centred, inclusive, and transparent.

7.5 **Production of Final Report**

The complete findings, proposals and recommendations emerging from the eighteen month study will be compiled into a bound 8.5"x11" document, with fold-out 11x17 pages as required. It is understood that several volumes may be required. Fifty (50) bound hard copies, and one (1) unbound hard copy of the complete report will be provided to the Capital District staff. The final report must also be provided in electronic format (Adobe PDF file) for posting on HRM's website and to facilitate distribution, with any 11x17 sheets presented in a separate PDF document. Electronic copies of all relevant graphic exhibits, slide presentations and project files should also be provided to the Capital District staff on a general archive CD.

8. **CHANGEABILITY OF URBAN DESIGN STUDY METHODOLOGY**

The Capital District staff appreciates that consultant teams may wish to suggest alterations to the Regional Centre Urban Design Study methodology laid out in this document, as well as to the schedule, based upon their past experience with projects of similar content and scope. HRM's ultimate goal is to produce the best possible Urban Design Study, so where consultants

feel that an amended methodology is desirable, and the amended methodology is clearly described, Capital District staff may, at their discretion, approve it.

9. PROJECT MANAGEMENT

Project Manager:

HRM's Capital District staff will be responsible for the day-to-day project management and administration, and will make all major strategic and resourcing decisions. This effort will be led by HRM's Urban Design Project Manager, Andy Fillmore.

Project Steering Committee:

This Committee will be comprised of key representatives from pertinent HRM departments and representatives from the Province and ACOA in their capacity as funding partners, and will provide advice and expertise to the consultant team and Capital District staff toward ensuring that the Project balances the strategic goals of the various HRM departments.

Project Advisory Committee:

A citizen-based Project Advisory Committee may be formed to aid in the public participation process, and to ensure that citizen and stakeholder interests are represented. This Committee would be formed at the commencement of the project.

10. BUDGET AND TENTATIVE PROJECT SCHEDULE PROPOSED BY H.R.M.

The Halifax Regional Municipality's Capital District staff has devised the following budget and tentative schedule for the Regional Centre Urban Design Study. While the overall duration of the project will be eighteen months, the Capital District staff appreciates that this schedule is general in nature, and staff is receptive to amended project schedules and budget allocations proposed by respondents in their submissions.

The overall budget for the Regional Centre Urban Design Study is currently fixed at \$200,000.00, inclusive of all taxes. Of this, \$130,000 will be borne by HRM, \$50,000 will be borne by the Atlantic Canada Opportunities Agency (ACOA), and \$20,000 will be borne by the Province of Nova Scotia.

Tentative Schedule and Budget:

	Phase	Tentative Schedule	Dollar Amount
1.	Urban Design Principles:	3 mos.: 01Mar06 to 30May06	\$25,000
2.	Urban Design Analysis:	3 mos.: 01Jun06 to 30Aug06	\$25,000
3.	Residential Infill Case Studies	3 mos.: 01Sept06 to 30Nov06	\$30,000
4.	Design of Opportunity Sites:	3 mos.: 01Dec06 to 28Feb07	\$30,000
5.	Implementation Strategy:	2 mos.: 01Mar07 to 30Apr07	\$25,000
6.	Implementation Tools:	3 mos.: 01May07 to 30Jul07	\$50,000
7.	Production of Final Report:	1 mo.: 01Aug07 to 31Aug07	\$15,000
	Total:	18 months	\$200,000.00

11. R.F.P. SCHEDULE

Issue Request for Proposals:	Friday, November 18, 2005
Voluntary Informational Session:	Friday, December 2, 2005, 2 p.m.
Receive Questions by:	Wednesday, December 7, 2005
Issue Responses to Questions by:	Monday, December 12, 2005
Closing of Request for Proposals:	Thursday, January 19, 2006
Short-list Interviews, if necessary:	Thursday, February 2, 2006, 10 a.m.
Contract Award:	Council session on Tuesday, February 14, 2006
Project Kick-off Meeting:	Thursday, February 16, 2006, 1 p.m.
Project Completion (18 month duration):	Approximately Thursday, August 31, 2007

Halifax Regional Municipality reserves the right to reject any or all submissions or accept any submission or portion thereof deemed to be in its best interest. Halifax Regional Municipality may negotiate a final offer with the selected proponent.

A fee will not be paid for the preparation or presentation of submissions in response to this Request for Proposals.

12. R.F.P. SUBMISSION GUIDELINES

12.1 General

Documents: Terms of Reference and other documents 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.

- All proposals are to be submitted on and in accordance with forms for this purpose, which are available at the Halifax Regional Municipality Procurement Office.
- All proposals are to be submitted in sealed, plainly marked envelopes.
- Additional information or clarifications of any of the instructions or information contained herein may be obtained from the Halifax Regional Municipality Procurement Office.
- Any proponent or proponent(s) 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 obligate the Halifax Regional Municipality to change the proposal. The Halifax Regional Municipality Procurement Office will notify all proponents in writing, by addendum duly issued, of any interpretations made of proposal instructions.
- 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.

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 on 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.

Reservations:

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

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.

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.

Expenses: 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.

Currency and Taxes: Prices are to be quoted:

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

Compliance with Laws: The Consultant will give all the notices and obtain all the licenses and permits, required to perform the work. The Consultant will comply with all laws applicable to the work or performance of the tender Contract. This however does not remove the burden of due diligence from the successful proposer with regards to safety and regulation compliance.

Ownership: All material produced and information collected by the consultant in performance of this Request for Proposal shall become the property of HRM. All material shall be kept confidential by the Consultant unless authorized in writing by HRM.

12.2 R.F.P. Submission Conditions

The submission of a proposal for this service will be considered as a representation that the proposer 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 serviced 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.

The following submission format **must** be adhered to:

- Submissions shall not exceed **fifty, (50)**, typed pages, single spaced, single sided.
- Individual resumes are not to exceed **three, (3)**, pages, single spaced, single sided.
- Portfolio of previous related projects is not to exceed **twenty, (20)**, single sided pages,
- All text shall be a minimum of 12 point font pitch.
- All submission sheets must be on 8½" X 11" paper size.

- In addition to submission hard copies listed above, an electronic “pdf” version of the RFP submittal is also required.

12.3 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 must have comprehensive understanding of this Request for Proposal. This understanding, and previous experience with projects of this scope and magnitude, are an essential component in the qualifying process.

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.

12.4 R.F.P. Requirements

To establish the capabilities and qualifications of proponents, specific information is requested, including corporate profile, service delivery capability, project management and technical support ability, relevant experience and references, management support programs, proven successes in similar undertakings, and additional background information as outlined herein. Please note that **non**-HRM staff references are preferred.

Proponents are encouraged to submit as detailed a document as possible in support of their capacity to meet the requirements of this Request for Proposal, without exceeding the specified restrictions.

To assure a uniform review process, and to obtain the maximum degree of comparability, each proposal shall contain the following information with the numbering system as noted below:

Understanding of Halifax Regional Municipality’s Requirements:

1. A brief statement to indicate the proponent’s understanding of Halifax Regional Municipality’s requirements for this initiative.

Corporate Profile:

1. Mission, vision and values of the proponent;
2. Overview of capabilities and services;

3. Three related customer references including location, customer contact, nature of services, value of Contract and key outcomes achieved; and
4. Outline of criteria that differentiate the proponent from its competitors.

Organization and Personnel:

1. Organizational structure, including sub-consultants and individuals proposed to be assigned to the project, and approach to team coordination;
2. Background and experience of key personnel for provision of similar services; and
3. Team composition, including any sub-consultants to be utilized;
4. Relevant experience in completing assignments of similar scope and complexity;
5. Experience of the proponent and key personnel with similar initiatives and the range of specified services, including public outreach;
6. Previous experience with and/or knowledge of the Halifax Regional Municipality.

Provision of Services:

1. Scope of Services
 - a) Outline of approach to completing all aspects of the scope of services, including for each service area a statement as to whether this service would be self-performed or sub-contracted; and
 - b) Approach to ensuring optimal value for money for Halifax Regional Municipality.
2. Approach to Management of Project
 - a) Approach to management of project;
 - b) Approach to customer contact and communications;
 - c) Approach to quality management;
 - d) Detailed work plan/methodology for completing all components of the scope of work in accordance with the specified time lines and Gantt schedule, and a work breakdown matrix of all personnel, including clerical, showing anticipated hours of involvement, broken down by phase of work as per the Lump Sum Price Proposal with sub totals for each phase as well as total project hours; and

Financial and Contract Terms:

1. Statement of acceptance of terms and conditions of the Request for Proposals, including agreement to enter into an agreement requiring the consultant to

deliver the project within 10% of the budget estimate to be developed and approved by Halifax Regional Municipality (executed Proposal Submission Form);

2. Approach to adjusting Contract terms for a decrease or increase in scope of services.
3. Lump sum price and additional work fee information, (executed Proposal Submission Form).

12.5 R.F.P. / Project Submission Questions

Any question concerning the procurement process for this Request for Proposals should be directed to:

Dale Carman: Procurement Coordinator, (902) 490-6476, carmand@halifax.ca

Any questions of a technical nature regarding this Request for Proposals should be directed to:

Andy Fillmore: Capital District Urban Design Project Mgr., (902) 490-6495, fillmoa@halifax.ca

Any significant questions received before Wednesday, December 7, 2005 will be responded to in writing by Monday, December 12, 2005, with copies of the questions and associated responses distributed to all proponents having obtained copies of this Request for Proposals.

12.6 Receipt of R.F.P. Submissions

Interested proponents are invited to submit twelve, (12), hard copies of their response; eleven (11), bound and one (1), unbound, and one electronic copy (Adobe "PDF" format) to demonstrate their capabilities and qualifications with respect to the services under consideration. Submissions must be in conformance with the requirements stated in this Request for Proposals document.

All submissions must be presented in a sealed envelope and clearly labeled as:

RFP#: 05-073: "Regional Centre Urban Design Study"

Sealed submissions will be received at:

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

R.F.P. Submissions will be received until Thursday, January 19, 2006 @ 4:30 p.m. Late or misdirected submissions will not be accepted and will be returned unopened.

Proposals will be binding for 60 Days. Unless otherwise specified, all formal proposals submitted shall be irrevocable for 60 calendar days following proposal opening date, unless the proponent(s), upon request of the Purchasing Agent, agrees to an extension.

13. EVALUATION CRITERIA

The submissions will be reviewed by the Project Steering Committee, consisting of representatives from various departments within the Halifax Regional Municipality.

All proposals will be evaluated and ranked against the following criteria and associated weighting:

	Item	Maximum Score
1.	Adherence to the requirements of the Request for Proposal	Mandatory
2.	Proponent's team, including but not limited to: <ul style="list-style-type: none"> - Team composition and representation of all necessary disciplines, including architecture, urban design, planning, landscape architecture, project management, and public outreach (20%). - Relevant experience in completing assignments of similar scope and complexity (20%). 	40%
3.	Organization and personnel: <ul style="list-style-type: none"> - Completeness of team and experience of individual members (5%) - Organizational structure and team coordination (5%) 	10%
4.	Approach to scope of required services, management of project, suitability of proposed work plan, Gantt chart of proposed schedule, and matrix showing contribution of all personnel and anticipated hours of involvement.	40%
5.	Fee proposal and acceptance of terms and conditions.	10%
Total:		100%

Short-listed proponents may be requested to make a presentation and to be interviewed by the Selection Committee. Proponents shall have their key members present for the interview(s).

The information received in response to this Request for Proposals will be utilized only in the evaluation of service capabilities and qualifications for the purpose of selecting the successful proponent. All submissions will be treated as confidential.

Unsuccessful proponents will be mailed notification after the completion of the evaluation. A debriefing with respect to the evaluation of their submission will be available upon request by unsuccessful proponents.

14. 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.

15. CONTRACT ADMINISTRATION

After Contract award, all coordinating services will be through the Capital District's Urban Design Project Manager, Andy Fillmore, Phone (902) 490-6495, 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.

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 Personnel and Services Provided

Payment shall be made upon presentation by the Consultant of a valid invoice, and upon authorization by the Contract Administrator. Normal payment terms for the Halifax Regional Municipality are thirty days from acceptance that the goods and/or services meet specifications.

16. 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.

17. INDEMNITY

Upon Contract award, the successful proposer will be required to indemnify and hold the Halifax Regional Municipality Pension Plan 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.

18. 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.

19. AVAILABILITY OF FUNDS (Budget)

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

A budget inclusive of all taxes and expenses/disbursements in the amount of \$200,000.00, inclusive of applicable taxes, has been allocated to this project.

20. INTERPRETATION

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

21. 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.

22. 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.

23. 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.

24. 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.

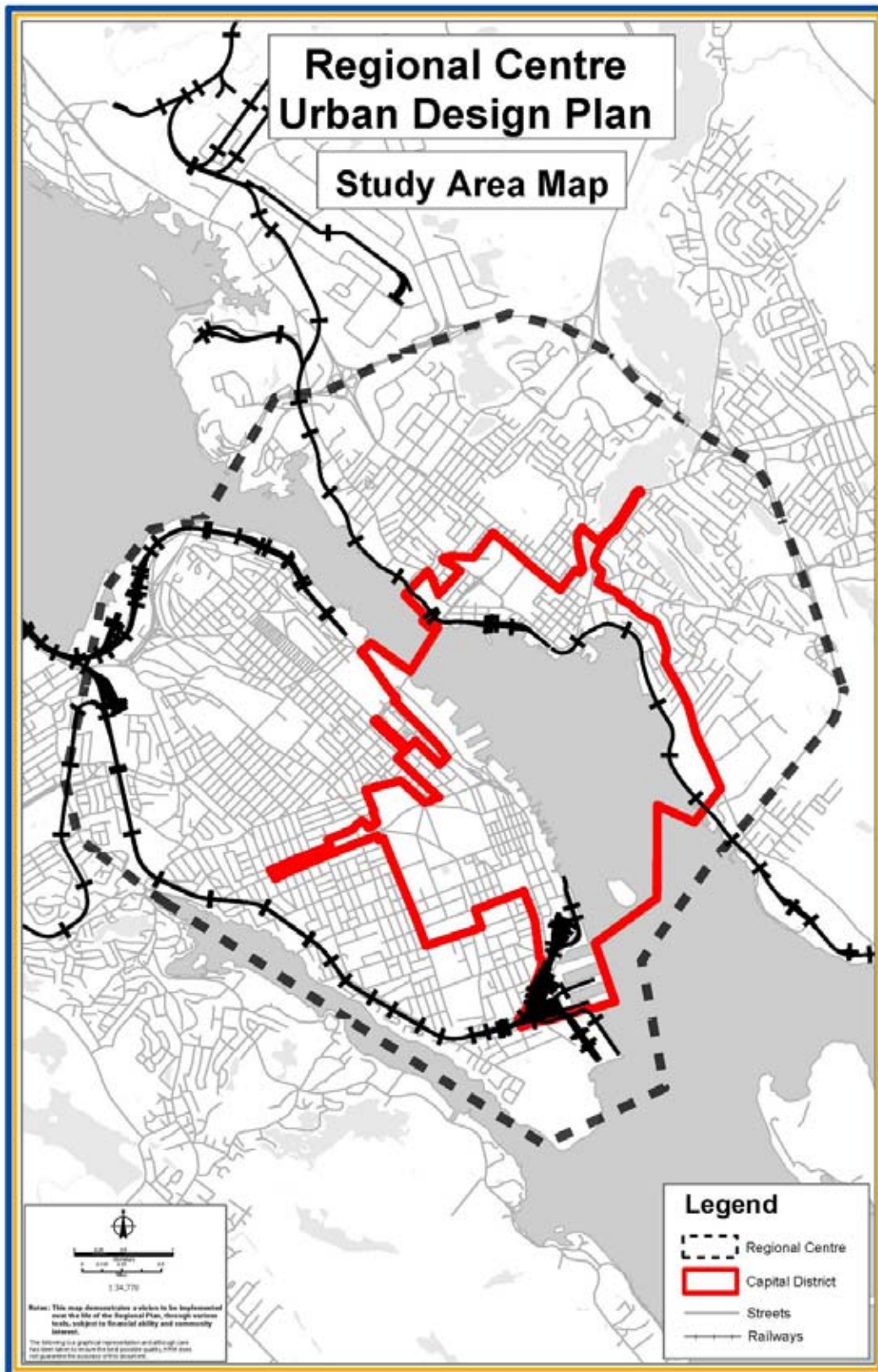
25. CONFIDENTIALITY

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.

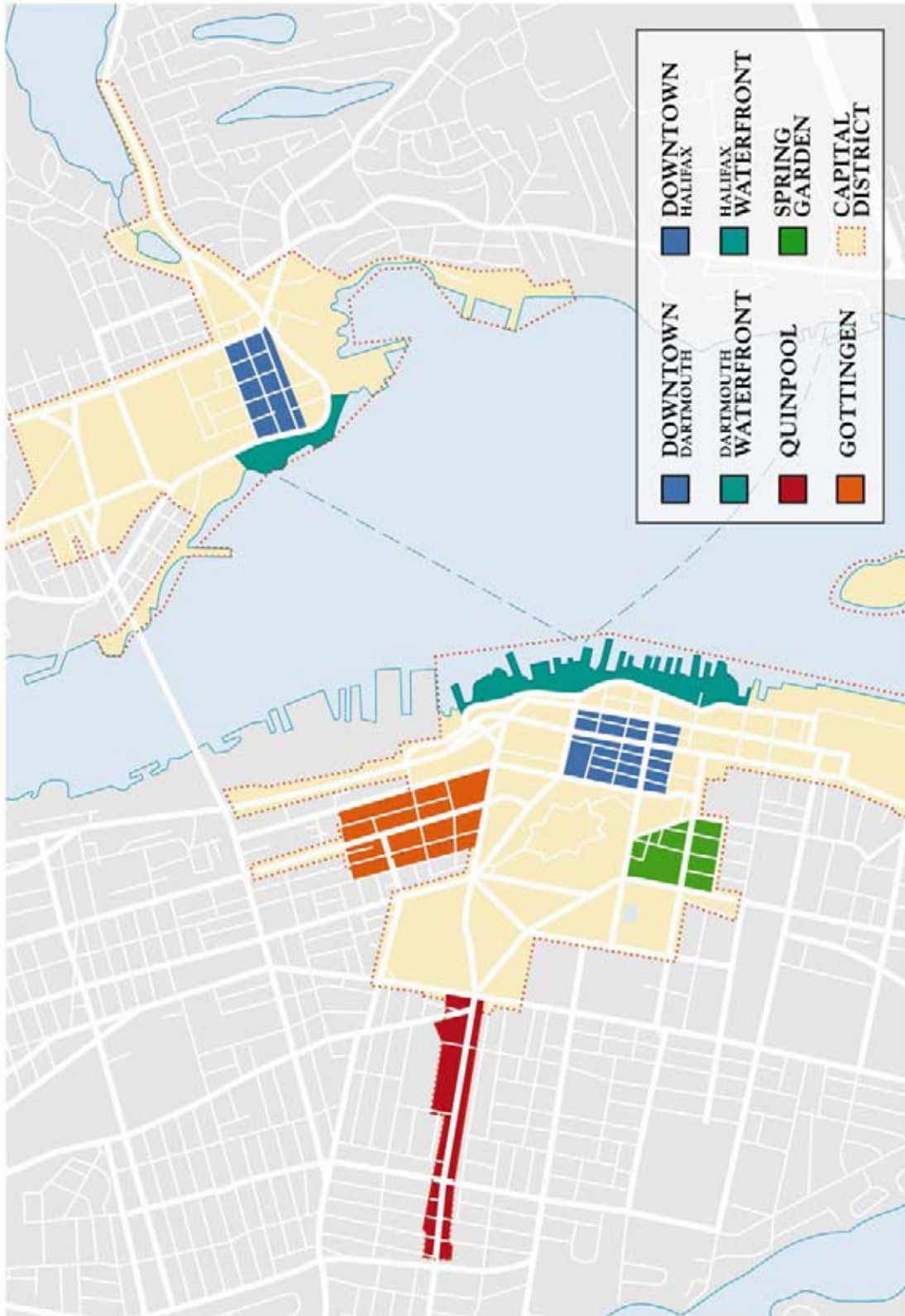
26. CLOSING STATEMENT

Halifax Regional Municipality would like to express their appreciation to respondents for wishing to assist HRM in our continuing quest to provide the highest possible quality of service to our communities, cost effectively and efficiently.

27. APPENDIX A: Regional Centre Map



28. APPENDIX B: Capital District Map



CAPITAL DISTRICT AND SUB-DISTRICT THEME AREAS

29. APPENDIX C: Reference Documents

Land Use Plans:

- Regional Plan (draft)
- Business Commission Streetscape Plans – Portland Street, Gottingen Street
- Downtown Dartmouth Secondary Planning Strategy, 2000
- Halifax Waterfront Development and Open Space Plan, 2002
- Halifax Port Authority Land Use Plan, 2002
- Halifax Parkland Strategy Concept Plan, 1995
- Halifax Common Plan, 1994
- Dartmouth Waterfront Greenway Plan, Acadia Street to Old Ferry Road, 2002
- Strategic Plan for Canadian Naval Heritage Foundation, 2002
- Waterfront Development Corporation Limited Signage Plan
- Dartmouth Parks and Recreation Signage Plan
- HRM Active Transportation Plan, 2005 (Draft)

Studies and Reports

- Capital District Case Study Report, 2003
- Capital District Urban Design Project, 2004
- Public Facilities Needs and Opportunities Strategy, 2004
- Barrington Street Heritage District Study, 2002
- Downtown Barrington Report, 1998
- Barrington Street Historic District Revitalization Plan & Bylaw, 2005 (Draft)
- Tourism Culture Heritage Visitor Information Report
- Underground Wiring Report
- Regional Planning Community Case Studies, 2002
- Capital District Vision Report, 2002
- HRM Arts & Culture Sector Economic Impact Study, 2005-11-18
- HRM Cultural Plan, 2005/06 (Draft)
- Spring Garden Road/Queen Street Area Public Lands Plan, 2006 (In Progress)
- Grand Parade/Province House Area Public Lands Plan, 2006 (In Progress)

Regulations and Guidelines

- Relevant Municipal Planning Strategies
- Sign By-Law
- Land Use By-Laws
- Halifax Commons Design Guidelines
- HRM Municipal Servicing Specifications (“Red Book”)
- Sidewalk Café Design Guidelines
- Parks & Open Space Planning Guidelines
- HRM Subdivision Bylaw

Note: Additional documents may be forthcoming at Project commencement.

30. APPENDIX D: Proposal Submission Forms

I / We hereby agree to provide to Halifax Regional Municipality all services, labour, and materials required to complete the assignment described in the Request for Proposal #:05-073 bearing the closing date of Thursday, January 19, 2006, and our Proposal in response, dated _____, 2006.

Proponent information:

Name of Proponent's Organization

Project Contact, Title

Head Office Mailing Address

Telephone

Fax

E-mail

Joint Venture or Partnership information

Name of Partner #2 Organization

Project Contact, Title

Head Office Mailing Address

Telephone

Fax

E-mail

Joint Venture or Partnership information, Continued

Name of Partner #3 Organization

Project Contact, Title

Head Office Mailing Address

Telephone

Fax

E-mail

Terms of Submission

I/We hereby submit our proposal for Halifax Grand Parade Management Plan for Halifax Regional Municipality as described in Request for Proposals #: 05-073, bearing the closing date of Thursday, January 19, 2006.

I/We understand that the lowest bid for any proposal will not necessarily be accepted.

I/We have carefully examined all Requests for Proposals documents and have a clear knowledge of the assignment, and that by submitting this Proposal Submission Form, I/We agree to all terms and conditions of Request for Proposals #: 05-073, bearing the closing date of Thursday, January 19, 2006.

I/We submit the requested information outlining the team organization and deployment of resources, experience of the firm and references, qualifications of the prime contact, and team qualifications. I/We recognize that the information and references submitted may be investigated and that pertinent information may be obtained, and thereby consent to such investigation.

I/We understand that the fee submitted in this Proposal Submission Form is based upon acceptance of the proposal within 60 days of the closing date established by the Halifax Regional Municipality for the receipt of proposals.

I/we understand that any omission or failure to answer questions included herein may result in my/our being disqualified from further consideration in the Request for Proposals.

Lump Sum Price Proposal

I / We hereby agree to provide to Halifax Regional Municipality all services, labour and materials required to complete the assignment described in Request for Proposals #: 05-073, bearing the closing date of Thursday, January 19, 2006 and our proposal in response, dated _____, including the cost of all allowable disbursements for the Lump Sum Price of

_____ Dollars

(\$ _____) Canadian, exclusive of all applicable taxes.

I / We understand that the Lump Sum Price stated above is the competitive price to be scored within the evaluation of the submissions as described in the Evaluation Criteria. The Lump Sum Price is the sum of all of the following prices which account for the scope of work described in the Scope of Services in the Request for Proposals:

General Program of Requirements: From Chapter 10 – Budget and Tentative Project Schedule (Proponents may amend budget distribution as required under provisions of Chapter 10).

**Tentative
Budget Distribution**

1.	Urban Design Principles:	\$25,000
2.	Urban Design Analysis:	\$25,000
3.	Residential Infill Case Studies	\$30,000
4.	Design of Opportunity Sites:	\$30,000
5.	Implementation Strategy:	\$25,000
6.	Implementation Tools:	\$50,000
7.	Production of Final Report:	\$15,000

Total Budget: \$200,000.00

Additional Work Fee Information

I / We hereby agree to provide additional consulting services upon receiving instructions in writing from Halifax Regional Municipality for the hourly rates stated below until completion of the assignment. Related and substantiated allowable disbursements will be paid at cost.

I / We agree that we will not charge for a reasonable number of changes to the defined Scope of Work. The following individuals/firms are to reflect the contribution matrix, as stipulated within the Evaluation Criteria of all personnel involved in completion of the assignment described in the Request for Proposal.

	Discipline / Title / Firm	Name of Individual	Hourly Rate
1.			\$_____/hr.
2.			\$_____/hr.
3.			\$_____/hr.
4.			\$_____/hr.
5.			\$_____/hr.
6.			\$_____/hr.
7.			\$_____/hr.
8.			\$_____/hr.
9.			\$_____/hr.
10.			\$_____/hr.

Append additional sheets if required.

I / We agree, for the Lump Sum Price stated, to supply all labour materials, and services for the execution and completion of the assignment in accordance with the Request for Proposals and our proposal. I/We agree to provide additional consulting services when requested in writing by Halifax Regional Municipality for the duration of the assignment, to be performed by the same firms/individuals proposed and accepted for the assignment at the hourly rates stated above.

I / we have received and allowed for addenda numbered ___ to ___ in preparing our proposal and this Proposal Submission Form.

I / We accept all the terms and conditions of this Request for Proposals, including agreement to enter into an agreement requiring me/us to deliver the project within 10% of the budget estimate to be developed and approved by the Halifax Regional Municipality. Should the lowest bona fide tender exceed the budget estimate for the construction by more than 10%, I/We will be responsible for redesign at my/our sole expense without detriment to the Halifax Regional Municipality's requirements or, if I / We so choose, make good the amount by which the bid exceeds \$110% of the estimate.

I / We have the authority to bind the proponent:

NAME OF PROPONENT or Joint Venture

SIGNATURE OF COMPANY OFFICIAL
(Signature for each official in Joint Venture)

WITNESS OR SEAL

DATE