



Municipal Heritage Partnership Program

Guidelines for Writing a 'Request for Proposals' for Heritage Conservation and Planning Work

When a municipality engages in a heritage program with the province, a consultant is often hired to help guide the process and provide advice on the development of the project.

The first step to finding a consultant is issuing a "Request For Proposals" (RFP). An RFP informs consultants about the project so that they can bid on it in a fair evaluative process.

Prior to undertaking an RFP a municipality may wish to consider issuing an "expression of interest". It identifies the project being undertaken, the timelines, and asks those interested in bidding on the project, what qualifications they will bring to it. With this information, an RFP can be sent to a select, qualified pool of candidates.

When writing an RFP it is important to ensure that enough information is included to allow the bidder to fully gauge the scope of work, the parties involved, contributions by the municipality, and expectations for the final product. When entering into a contract with the province, the municipality will receive a "terms of reference" for the project. This is useful to consultants however it does not contain enough information for them to develop a thorough proposal.

An RFP may or may not include fees to be paid to the consultant. If the fee is advertised then the municipality can select the bidder based on the scope of services offered by the bidder. If the fee is not advertised, the municipality can then select the bidder based on their quote and scope of services. Either approach has merit and is up to municipality's better judgment. It is important however that all consultants receive the same information to ensure a fair process.

Things you may want to include in your RFP are:

- Name, location, population and size of your municipality, or area focussed on for the contract;
- Background on the municipality and/or area, including previous related projects, brief context or history (a paragraph or two), and important stakeholders in the process;
- Scope of Work (what services are required as a minimum from bidders) and expectations;
- Available consulting fees (optional);
- Contributions from the municipality including number of volunteers, office space and equipment, photocopying, etc.;

- Timeline and due dates for proposals and services being provided;
- Contact information at your municipality;
- Criteria for selecting a consultant, such as price, services above and beyond the terms of reference, proposed methodology, etc.;

Things you may want to request in your RFP are:

- Team members and lead consultant, if more than one consultant or a firm is involved;
- The candidate's qualifications;
- Related work experience.
- References
- Methodology for completing the required tasks