



REQUEST FOR PROPOSAL SERVICE DELIVERY REVIEW

RFP'S RECEIVED BY:

The Corporation of Tay Valley Township
217 Harper Road
Perth, Ontario K7H 3C6

Attention: Amanda Mabo, Clerk

Telephone: 613-267-5353 ext. 130

Toll Free: 1-800-810-0161

E-mail: clerk@tayvalleytwp.ca

Website: www.tayvalleytwp.ca

**THE CORPORATION OF TAY VALLEY TOWNSHIP
REQUEST FOR PROPOSAL
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PART "A" – INFORMATION TO BIDDERS

1. Proposal Timing

The schedule for the Proposal anticipates the following milestones:

- Last Day for Questions: October 19th, 2020
- Last Day for Addenda: October 20th, 2020
- RFP Submission (Proposals due): October 22nd, 2020 at 1:00 p.m.
- Contract Award November, 2020

2. RFP Closing

Submissions, sealed in an envelope, clearly marked with the return address label (Form 1, attached), will be received by the undersigned or his/her designated representative, at the Municipal Office, 217 Harper Road, Perth, Ontario, until **1:00 p.m.**, local time, as determined by the clock located on the computer in the reception area of the Municipal Office, on **Thursday, October 22nd, 2020.**

Submissions received after closing time will not be considered.

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Perth, Ontario K7H 3C6

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3. RFP Submission

One copy of the **completed Declaration**, Appendix A, shall be submitted as part of the Proposal. The Declaration must be properly signed and witnessed, or signed, witnessed and sealed if the bidder is a Corporation. Proposals must be submitted, using the Appendix "D" - RFP Label (to be affixed on your RFP Envelope).

The Proposal must be typewritten. Proposals which are incomplete, conditional or obscure or which contain erasures or alterations not properly initialed, or irregularities of any kind, may be rejected. Submissions must not be restricted by a statement added to the Corporation of Tay Valley Township's ("the Township's") documents or by a covering letter, or by alterations to the documents supplied.

Submissions received by fax or email will not be accepted.

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4. Proposal Validity

Proposals shall remain valid and open for acceptance by the Township for a period of sixty (60) calendar days, following the closing date for receipt of Proposals.

5. Clarification of Documents

Any clarification of the Township's documents required by the Bidder, prior to submission, shall be directed to the Clerk. Any such clarifications so given shall not, in any way, alter the Township's documents and the Bidder and the Township agree that in no case shall oral arrangements be considered.

No officer, agent or employee of the Township is authorized to alter, orally, any portion of these documents. During the period prior to submissions, alterations will be issued to Bidders as written Addenda. In the submission, the Bidder shall list all Addenda that were issued and considered in the submission.

All questions shall be directed, in writing (by email) to the Clerk.

All questions/discrepancies identified must be sent to the Township at least three (3) business days prior to the submission due date.

Copies of all questions and answers and any addenda will be posted on the website no later than two (2) business days prior to the submission due date.

6. Contract Documents and Order of Precedence

The Contract documents shall consist of all the pages of the RFP documents, issued by the Township, and the Bidders submission. Do not remove any pages from the Township's Form.

These documents, and portions thereof, take precedence in the order in which they are named, notwithstanding the chronological order in which they are issued or executed.

The intent of the Contract is that the Company shall supply equipment and materials, or services complete and suitable for the Township' intended use.

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7. Addenda

Bidders may be advised of addenda, of required additions, deletions or alternations in the requirements of the Request for Proposal documents. All such changes shall become an integral part of the RFP documents and shall be allowed for in arriving at the total submission price.

8. Harmonized Sales Tax

Harmonized Sales Tax (H.S.T.), or any other applicable taxes, will be paid in addition to the total price submission.

The quoted price must clearly show the H.S.T. as a separate item from the total price submission.

9. Health and Safety

The Bidder assumes full responsibility for conforming to all legislation regarding the safety of his/her employees and the public on this Contract and all notices required to comply with the legislation.

Accordingly, the Bidder shall:

- a) Provide a copy of your Company's Health and Safety Policy, dated not later than **2020**, to be submitted with the Proposal. Only an electronic copy is required.
- b) **Provide a copy of the applicable WSIB Certificate of Clearance** or equivalent (if the Company is from outside Ontario), ensuring that all employees are fully covered by WSIB and its regulations, to be submitted with the RFP.

10. Accessibility

The Bidder shall provide a declaration with their Proposal that they are compliant with the Accessibility for Ontarians with Disabilities Act and its Regulations. An example of a declaration is attached in Appendix "E".

11. Proposal Checklist

To assist Bidders with completing a response to this RFP, a RFP Checklist is included in Appendix "C".

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12. Withdrawal

A Submission may be withdrawn at any time prior to the closing date and time at the Bidder's discretion. Withdrawal notification must be in written form, signed, and must be submitted to the CAO. No facsimile, telephone calls or emails will be accepted. After the official closing date and time, all Submissions received shall be irrevocable.

13. Public Opening

All submissions will be opened at the Municipal Office, 217 Harper Road, Perth, Ontario, on the same day and time as the closing date.

14. RFP Results

Only the names of the Bidders who submitted a proposal will be made available at the RFP Opening. After the RFP Opening, requests may be submitted to The Corporation of Tay Valley Township for the results and only the names of the Bidders, as read out at the RFP Opening, will be given in the reply. A list of Bidders will be posted on Tay Valley Township's website at www.tayvalleytwp.ca within 48 business hours of the RFP opening.

15. Submission Acceptance

It shall be the policy of the Township that in any procurement of goods, services, facilities or construction invitations to submit a proposal to the Township, the Township reserves the right to reject an offer to supply goods and/or services or RFP's presented in response to the Township's procurement processes where the Township determines, in its sole and unfettered discretion, that the entity making the offer has performed poorly on any Township contract during the previous five-year period. Township Council may remove a Bidder's name from consideration for a contract under this Policy, for a period of up to five (5) years, on the basis of documented poor performance or non-performance on a Township Contract.

The Bidder may be required to show, in terms of experience and facilities, evidence of its ability, as well as that of any proposed subcontractor, to perform the work by the specified delivery date.

The Township reserves the right to award by item, or part thereof, groups of items, or parts thereof or all items of the Submission, and to award Contracts to one or more Bidders submitting identical prices, to accept or reject any Submission in whole or in part, to waive irregularities or omissions. If in so doing, the best interests of the Township will be served, no liability shall accrue to the Township for their decision in this regard.

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The acceptance of any Submission is subject to appropriate funding acceptable to the Township.

The lowest, or any RFP, is not necessarily accepted.

The placing in the mail or delivery of a notice of award to the Bidder address, given the Submission, shall constitute notice of acceptance of the Contract.

16. Insurance

Commercial General Liability Insurance

The Company shall, at their expense obtain and keep in force during the term of the Contract, Commercial General Liability Insurance satisfactory to the Township. The policy shall be underwritten by an insurer licensed to conduct business in the Province of Ontario and include but not be limited to the following:

- a) Third party Bodily Injury, Personal Injury and Property Damage, to an inclusive limit of not less than \$5,000,000 per occurrence with an aggregate of not less than \$5,000,000.
- b) The Township shall be added as an additional insured with respect to the operations of the Named Insured.
- c) The policy shall contain a provision for cross liability and a severability of interest clause.
- d) Non-owned Automobile Coverage for a limit of not less than \$5,000,000 including contractual non-owned coverage.
- e) Products and completed operations coverage.
- f) Contingent Employer's Liability.
- g) Broad Form Property Damage.
- h) The policy shall contain a provision for contractual liability – oral and written.
- i) Owner's and Contractor's Protective.
- j) The policy shall provide the Township with 30 days' notice of cancellation or nonrenewal.

Certificate of Insurance

The Company shall provide a Certificate of Insurance evidencing coverage in force at least 10 days prior to Contract commencement.

The Company remains responsible for maintaining the required insurance even if the certificates are never exchanged and/or requested.

Professional Liability Insurance

The Company shall take out and keep in force Professional Liability insurance in the amount of \$2,000,000 providing coverage for acts, errors and omissions arising from their professional services performed under this Agreement. The policy SIR/deductible shall not exceed \$100,000 per claim and if the policy has an aggregate limit, the

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amount of the aggregate shall be double the required per claim limit. The policy shall be underwritten by an insurer licensed to conduct business in the Province of Ontario and acceptable to the Township. The policy shall be renewed for 3 years after contract termination. A certificate of insurance evidencing renewal is to be provided each and every year. If the policy is to be cancelled or non-renewed for any reason, 90 day notice of said cancellation or non-renewal must be provided to the Township. The Township has the right to request that an Extended Reporting Endorsement be purchased by the Company at the Company's sole expense.

Automobile Liability Insurance

Automobile liability insurance in respect of licensed vehicles shall limits of not less than \$2,000,000.00 inclusive per occurrence for bodily injury, death and damage to property, covering all licensed vehicles owned or leased by the Contractor, and endorsed to provide Tay Valley Township with not less than 30 days' notice, in writing, in advance of any cancellation, change or amendment restricting coverage.

17. Indemnification

The Company acknowledges that he/she is an independent Company and shall, defend, indemnify, protect and save harmless The Corporation of Tay Valley Township, its officers, members of municipal council, its agents and employees from any and against all damages, liabilities, claims, expenses, demands, loss, costs (including legal costs), actions, legal costs, suits or other proceedings by whomsoever made, directly or indirectly arising out of the Contract attributable to bodily injury, sickness, disease or death or to damage to or destruction of tangible property including loss of revenue or incurred expense resulting from disruption of service and caused by any acts or omissions of the Company, its officers, agents, servants, employees, customers, invitees or licensees, or occurring in or on the premises or third party premises as a result of activities of whatsoever nature arising out of the furnishing by the Company, its agents or employees of the materials and/or performing of the services covered by this Contract. This indemnity shall be in addition to and not in lieu of any insurance to be provided by the Supplier in accordance with this Contract, and shall survive this Contract.

18. Failure to Enter into an Agreement

In addition to all of the Township's other remedies, if a selected Bidder fails to execute the accepted agreement or satisfy any other applicable conditions within ten (10) days of notice of selection, the Township may, in their sole and absolute discretion and without incurring any liability, approve an extension (*should agreement changes be requested*), or rescind the selection of that Bidder and proceed with the selection of another Bidder.

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19. Assignment

The Company shall not assign the Contract, or any portion thereof, without the prior consent of the Township.

If the Township agrees to the assignment of the Contract, all Assignment Agreements will be prepared, at the sole cost of the Company, and under no circumstances will the Township be responsible for these costs.

20. Laws and Regulations

The Company shall comply with relevant federal, provincial and municipal statutes, regulations and by-laws pertaining to the work and its performance. The Company shall be responsible for ensuring similar compliance by its suppliers and sub-contractors.

The Company shall be governed and interpreted in accordance with the laws of the Province of Ontario.

21. Default by Company

If the Company commits any act of bankruptcy or if a receiver is appointed on account of its insolvency or in respect of any of its property or if the Company makes a general assignment for the benefit of its creditor, then, in any such case, the Township may, without notice, terminate the Contract.

If the Company fails to comply with any request, instruction or order of the Township or fails to pay its accounts or fails to comply with or persistently disregard statutes, regulations, by-laws or directives or relevant authorities relating to the work or fails to perform the work with skill and diligence or assigns or sublets the Contract without the Township written consent or refuses to correct defective work or is otherwise in default in carrying out its part of any of the terms, conditions and obligations of the Contract, then, in any such case, the Township may, upon expiration of ten (10) days from the date of written notice to the Company, terminate the Contract.

Any termination of the Contract by the Township, as aforesaid, shall be without prejudice to any other rights or remedies the Township may have.

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If the Township terminates the Contract, they are entitled to:

- Take possession of all of the work in progress and finish the work by whatever means the Township may deem appropriate under the circumstances.
- Withhold any further payments to the Company until its liability to the Township can be ascertained.
- Recover from the Company loss, damage and expense incurred by the Township by reason of the Company's default (which may be deducted from any monies due or becoming due to the Company, any balance to be paid by the Company to the Township).

22. Contract Cancellation

The Township shall have the right, which may be exercised from time to time, to cancel any uncompleted or unperformed portion of the work or part thereof. In the event of such cancellation, the Township and the Company shall negotiate a settlement.

The Township shall not be liable to the Company for loss of anticipated profit on the cancelled portions of the work.

23. Responsibility

The Township shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Bidder prior to, subsequent to, or by reason of the acceptance or the non-acceptance of an RFP save as provided in the Contract. The Township reserves the right to reject any or all RFP's and to waive formalities as the interest of the Township may require without stating reasons, therefore, and the lowest or any RFP will not necessarily be accepted.

24. Payments

The Company shall invoice the Township monthly, for services and materials provided. The Township shall pay said invoice within thirty (30) days of receipt of the invoice.

The Township shall have the right to withhold, any sum otherwise payable to the Company, such amount as may be sufficient to remedy any defect or deficiency in the work, pending correction of the same.

Invoices shall contain a breakdown of names of employees, sub-contractor hours and rates, hours of work, position, and expenses. The Company shall provide a financial report with each invoice which shall include the following headings: budget (billings), fees (previous billings), expenses, total contract billing approved amount and percent complete.

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The successful Company will be required to complete the applicable paperwork to facilitate payment via Electronic Funds Transfer (EFT). This paperwork will be provided to the Bidder by the Township after the Contract is awarded.

25. Disbursements

All reasonable and proper expenses incurred by the Company shall be reimbursed without any allowance for overhead and/or profit.

The following costs shall not be reimbursed:

- communication expenses including facsimile, local phone and cellular charges
- standard PC or computer aided design and drafting equipment (excludes specialized equipment or software as identified in the Company's proposal)

26. Municipal Freedom of Information and Protection of Privacy Act

Any personal information collected by or on behalf of the Township under this Request for Proposal is subject to the *Municipal Freedom of Information and Protection of Privacy Act*. The information provided to the Township may be used to confirm certain information provided in the submissions for this project. The person submitting this Proposal consents to such collection and use of the information. The person submitting this Proposal acknowledges the Proposal is a public document and that the information contained in the Proposal may become public and consents to the release of that information. By responding to this Request for Proposal, respondents waive any challenge to the Township decision in this regard. Any questions regarding the collection, use, or disclosure of the information should be directed to the Clerk.

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PART "B" – PROJECT INFORMATION

1. Project Overview

Tay Valley Township ("the Township") is requesting proposals ("the Proposal") from qualified Consultants to provide consulting services to conduct a service delivery and organizational review. It is expected the project will be carried out in two phases. The first phase will focus on services and service delivery methods. The second phase will consider the conclusions made in Phase 1 and make recommendations on an appropriate organizational structure to support the delivery of services.

The purpose of the Service Delivery Review (SDR) is to quantify and improve the understanding of the services currently provided by the Township, and those that the Township should consider for the future, and provide better information that will allow the community, Council and staff to make informed strategic decisions regarding those services. The SDR will accomplish this by investigating current services and how they are delivered, identifying potential changes in the type of services offered or new services, service delivery methods and/or service levels and recommending changes that will improve the responsiveness, efficiency and effectiveness of the services offered by the Township.

2. Service Delivery Review Strategy

A SDR is an evaluation process in which the systemic review of a specific municipal service(s) determines whether that particular service is needed; if so, at what level the service is needed based on several criteria (legally, economically, or for the benefit of the community); and the most appropriate, responsive, effective and efficient way to provide that service.

A SDR involves asking the following questions about service and cost management:

- Does the municipality need to provide this service/business?
- What do citizens expect of the service and what outcomes does Council want for the service?
- Are there areas that require new or enhanced service?
- What are the full costs and benefits of the service?
- What are the alternative ways of delivering the service?

3. Background

Tay Valley Township is a rural municipality in Lanark County located midway between Ottawa and Kingston and adjacent to the Town of Perth. A permanent population of approximately 5,600 which doubles as cottagers return to the lakes in the summer months. The Township represents a land area of approximately 549 square kilometres and contains 32 lakes and 8 rivers.

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PART "B" – PROJECT INFORMATION

Tay Valley's 2020 municipal budget represents \$7.4 million in total operating budget expenditures and \$3.1 million in capital expenditures. The Township's total assessment value for 2020 is \$1.3 billion.

Council has attempted to maintain taxation increases at an affordable level, despite new obligations from the Province, the reality of aging infrastructure and expectations for services from ratepayers.

In order to identify potential opportunities for cost savings, efficiencies and the potential for new or expanded revenue streams, the Township has identified the completion of a Service Delivery Review as Council's top priority for this term. The SDR is intended to evaluate municipal operations and financial performance with a view of identifying options for maintaining adequate service levels while ensuring long-term financial sustainability.

Council wishes to investigate opportunities to modernize municipal services and/or find efficiencies in the delivery of services. The review may identify shared services and/or service arrangements with municipal and/or private partners with particular attention to modernization techniques and systems for the provision of services.

A complete review of Township services, programs and overall operations is required to ensure maximum organizational efficiency and performance.

4. Nature of Consulting Agreement

The Township wishes to engage a Consultant with experience in the operations and organization of municipalities in Ontario to conduct a Service Delivery and Organizational Review. This review will have a specific focus on service provision and identifying opportunities to improve the overall effectiveness and efficiency of Township operations.

The Consultant must submit demonstrated ability for the following:

- knowledge, understanding and experience in successful service delivery reviews and organizational reviews;
- professional, independent and impartial recommendations;
- successful project management abilities;
- the resources to meet the timelines of the project;
- exceptional communication skills both written and verbal.

The Consultant shall provide a detailed review of the services currently offered by the Township and the possible new services required by future circumstances. The Consultant will identify opportunities for improvement that will achieve greater responsiveness and efficiency in municipal operations, reduce operating costs, increase revenue and establish long term sustainability.

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PART "B" – PROJECT INFORMATION

5. Review Principles

The Consultant will base this review on the following Principles:

- the Review will be open and transparent, engaging all levels of the organization and considering community priorities. The proposal will identify the process and steps to best achieve the objectives, deliverables and principles identified herein;
- the Review will involve consultation with members of Council and staff as deemed necessary;
- the Review will respect the Collective Bargaining Agreement.

6. Project Objectives

Specific project objectives include:

- options for maintaining adequate service levels while allowing long term sustainable financial objectives to be met;
- to prepare an inventory of services currently being provided by the Township and evaluate these services for alignment with the needs, wants and financial capacity of the community;
- to identify possible new services required for future circumstances and evaluate these services for alignment with the needs, wants and financial capacity of the community;
- identify optimal service levels to improve service delivery methods, and achieve greater efficiency through various means, including exploring shared service with neighbouring municipalities and the private sector;
- to compare Tay Valley's services and operations to those in similar communities locally and across the province, identifying those employing best practices;
- to determine the most cost-effective and strategic way to structure Township operations to meet current and future needs, taking into account other stakeholder partnerships that exist or could be created within the community;
- to review the current organizational structure of the Township, current procedures and systems, and the resources allocated with regard to the operational requirements and objectives that have been assigned.

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- to recommend practical, achievable and realistic revisions/adjustments to the overall organizational structure, which may include:
 - (a) clarifying roles, responsibilities and authority of Council and management staff;
 - (b) eliminating duplication and overlap;
 - (c) identifying gaps in service and areas where services should be increased;
 - (d) improving communications between the Township and the public;
 - (e) achieving cost savings through a focus on modernization of the service delivery model;
 - (f) opportunities for cost savings, efficiencies and the potential for new or expanded revenue streams.

7. Project Methodology

The Consultant shall submit a proposed methodology to achieve the project objectives set out above, which should incorporate the following elements:

- inventory all current services provided by the Township generally and departments in particular as well as new services required to meet future circumstances; and identify the resources applied to each of these services and provide qualified opinion on adequacy of resourcing;
- interview key stakeholders, including members of Council and staff, to obtain comments and observations about current operations, and provide recommendations for improvements, as well as any new services;
- compile and review pertinent background information including:
 - (a) current organization chart and staff count;
 - (b) general industry service norms or standards for delivery of services.
- analyse information to identify key issues, trends and patterns, from which a structured questionnaire could be prepared to obtain pertinent information from employees and stakeholders;

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- recommendations on how to deliver both mandatory services and community supportive services in a cost-effective manner;
- significant patterns and trends in municipal services, organization structure, including, reporting relationships, and position functions;
- collect benchmarking data regarding municipal services, service levels and organizational efficiency and effectiveness in comparable municipalities; and identify keys trends and patterns in service delivery, and improvements that can be applied to Township operations.

8. Deliverables

The Consultant shall provide specific recommendations in regards to changes in services and programs and resources including whether specific services should be implemented, reduced, expanded, discontinued, or delivered in an alternate way and whether specific services and programs are best delivered by the Township, through shared service agreements with other municipalities or agencies, including the private sector.

Based on the recommended service delivery model, the Consultant shall recommend changes to the operational structures, applicable departments, divisions or other service providers, services and programs, updated reporting responsibilities, etc. with a view of maximizing innovations, adaptability and accountability.

The Consultant shall prepare a draft final report and review project findings and proposed recommendations (including a recommended implementation and/or phasing plan, by an agreed upon completion date, with the Project Team (Reeve, Deputy Reeve and Chief Administrative Officer).

The Consultant shall present a final written report summarizing the results of the SDR incorporating findings, conclusions, recommendations and implementation plans to the Township by the agreed upon completion date.

The Consultant shall present the final report at a meeting of Council.

The Consultant shall provide assistance to the Project Team in planning and communicating the project to stakeholders at key intervals throughout the duration of the project.

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9. Current Organizational Structure

Schedule 'A' is a copy of the current organizational chart for the Township. It is comprised of 5 Departments representing 17 permanent full-time employees, of which 10 are unionized (OPSEU) and the remainder are non-union positions; 4 permanent part-time employees, of which all are unionized (OPSEU), 5 casual employees with no scheduled hours, of which all are unionized (OPSEU) and 3 summer students, which are non-union, from the beginning of May to the end of August . Total payroll and benefits budgeted in 2020 is \$1.8 million (excludes Council).

10. Current List of Services Provided

Schedule "B" is a current list of services provided by the Township.

11. Proposal

Proponents are required to submit three (3) copies of their proposal in hard copy and one electronic copy in .pdf format, on a secure USB stick.

The proposal shall include:

- (a) an overview of the proposed methodology;
- (b) names of the key personnel to be assigned with resumes outlining qualifications and experience;
- (c) relevant experience of key personnel and the firm in conducting service delivery and organizational reviews of the nature set out herein;
- (d) names and contact information for a minimum of three (3) references who can attest to the Consultant's performance on similar assignments;
- (e) project schedule with relevant milestone dates identified; and,
- (f) project costing which shall include an upset limit (fees and disbursements) including the hourly rates for the assigned staff.

12. Target Completion Dates

The Consultant's proposed schedule shall reflect the anticipated start and completion dates assuming a contract award date of November, 2020.

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13. Project Management

The Consultant is expected to actively manage the project and is responsible to ensure the project is completed in accordance with the Agreement in a timely manner and within budget. A summary of the activities to be undertaken in this task is, but not limited to, the following:

- Coordinating the work of the Consultant and any Sub-Contractor;
- Provide regular and as-requested updates to the Township on the status of the project;
- Prepare and present the final report to Council; and,
- Prepare and submit invoices, and progress reports at milestone stages of the project to the Township's satisfaction.

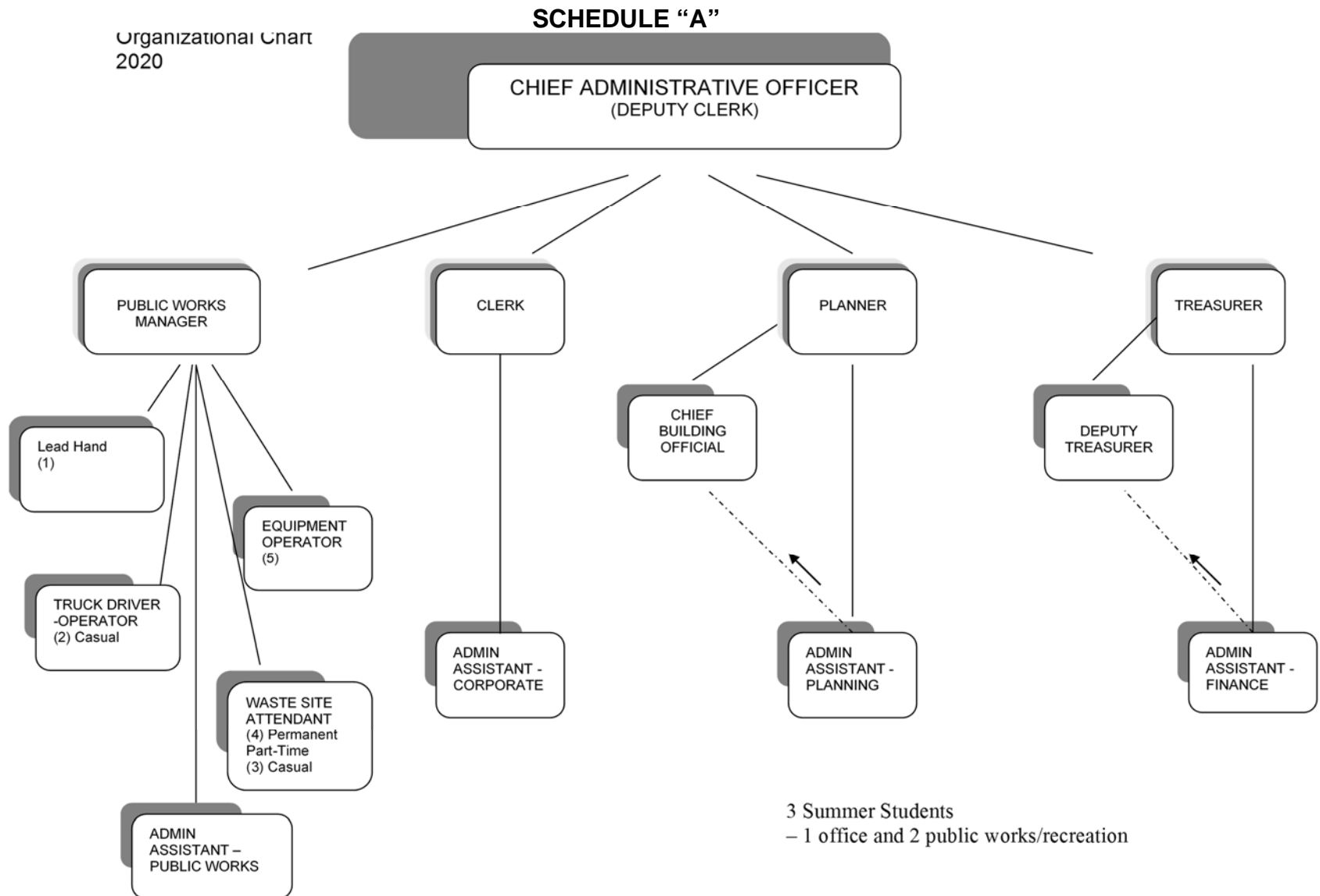
14. Project Reporting

Amanda Mabo, Acting CAO/Clerk, will be the key contact person for this project:

Mailing Address: 217 Harper Road
Perth, Ontario K7H 3C6
Telephone: (613) 267-5353 ext. 130
Email: clerk@tayvalleytwp.ca

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PART "B" – PROJECT INFORMATION

SCHEDULE "B"

CURRENT LIST OF SERVICES BY DEPARTMENT

CAO's Office

- General Administration
- Employee and Labour Relations
- Economic Development

Clerk's Department

- Accessibility
- Advertising/Media
- Age Friendly
- Animal Control
 - Animal Control
 - Pound Services
 - Livestock Valuer
 - Fence Viewers
- By-Laws
- Cemeteries
- Council
 - Council
 - Committees
 - Boards & Commissions
- Commissioner of Oaths
- Elections
- GIS
- Human Resources
- Information Technology
 - Hardware & Software
 - Internet
 - Website
 - Facebook
 - Cell Phones
- Legal
- Municipal Freedom of Information & Protection of Privacy Act (MFIPPA)
- Police Services
 - Contract Administration
 - Police Services Board
- Policies & Procedures
- Reception (telephone, front counter, general inquiries/complaints)
- Records and Information Management
- Recreation

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- Programs (Choir, Hockey, Karate, Soccer, Bicycle Tay Valley)
- Volunteers
- Refreshment Vehicle Licenses
- Road Closings
- Vital Statistics

Finance Department

- Accounts Payable & Receivable
- Annual Audit Preparations
- Asset Management
- Budgeting
- Capital Planning
- Community Hall Bookings
- Financial Reporting/Operation
- Grants
- Lottery Licensing
- Municipal Small Drinking Water System Program
- Office Supplies
- Payroll and Benefits Administration
- Taxation

Building and Planning Department

- Building Permits
- By-Law Enforcement
- Compliance Reports
- Development Agreements
- Green Energy and Climate Change
- Heritage & Culture
- Limited Services Agreements
- Minor Variances
- Official Plan
- Septic Inspection & Re-Inspection
- Severances
- Site Plan Control
- Source Water Protection
- Subdivisions
- Zoning By-Law

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Public Works Department

Transportation

- Roads
 - Construction
 - Maintenance
- Bridges, Culverts
- Civic Addresses
- Entrance Permits
- Facilities
- Fleet
- Noxious Weeds
- Parking Tickets
- Signs & Signals
- Street Light Outages

Environmental Services

- Waste Sites & Transfer Stations
- Household Hazardous Waste
- Municipal Drains
- Recycling
- ReUse Centre
- Utilities

Other Boards (excluded from this review).

- Fire
- Library
- Police Services

**THE CORPORATION OF TAY VALLEY TOWNSHIP
REQUEST FOR PROPOSAL
SERVICE DELIVERY REVIEW**

PART "C" – PROPOSAL EVALUATION

1. Submission Instructions

This RFP is to be divided into two components - Proposal and Financial.

The Bidder shall submit, in one sealed package, two (2) hard copies of each component in separate documents. The submissions shall also include one electronic copy, in PDF format, of both components saved as separate files.

Bidders are required to prepare their submission as follows:

Component 1 – Proposal

Shall be a response to Part “B” – Project Information including any appendices, a cover letter and a table of contents. The Proposal shall not exceed eight (8) single-sided letter size pages in a minimum 12-point font including spreadsheets, which can be submitted in 11 x 17 format and shall count as one (1) page. Appendices such as detailed résumés and level of effort tables (excluding prices) may also be included and do not count towards the maximum number of pages. Component 1 shall also include the following as appendices:

1. Appendix “A” – Declaration
2. Appendix “C” – Bidders Checklist
3. Appendix “E” – Accessibility Declaration
4. Health and Safety Policy – 2020
5. WSIB Clearance

Component 2 - Financial

Shall be the Bidder’s financial offer and should correspond with the Bidder’s proposed schedule and each phase of the project. This section shall provide a breakdown of costs for each phase and contain the following:

1. Appendix “B” – Financial Offer

It is requested that pricing information not be included within Component 1 of the submission.

2. Evaluation and Selection Methodology

Proposals will be evaluated in accordance with the steps identified below. Bidders are required to address each requirement in sufficient depth in their submission to permit a full evaluation of their Proposal. The onus is on the Bidder to demonstrate that it meets the requirements specified in this RFP.

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PART "C" – PROPOSAL EVALUATION

The Township will evaluate the submission solely on the documentation provided as part of the Proposal. References in the submission to additional information not submitted as part of the Proposal, such as a website address where additional information can be found, will not be considered in the evaluation of the Proposal.

Assessment of the Proposal submissions will commence after the RFP closing date.

3. Conduct of Evaluation

In conducting its evaluation of Proposals, the Township may, but will not be obligated to do the following:

- Seek clarification or verification from the Bidder regarding any or all information provided by them with respect to this RFP;
- Contact any or all references supplied by the Bidder to verify and validate any information provided by them;
- Request specific information with respect to the Bidder's legal status;
- Conduct a survey of the Bidder's financial capabilities to determine if they are adequate to meet the requirements of this RFP.

Bidders will be given a specific number of days by the Township to comply with any request related to any of the above items. Failure to comply with the request may result in the Proposal being declared non-responsive.

4. Evaluation Team and Process

An evaluation team comprised of Township officials will review all Proposals received and score the Proposals using a consensus approach in relation to the requirements and points that are identified herein. The Township reserves the right to engage professional external or subject matter experts to assist with the evaluation process.

By submitting a Proposal, the Bidder agrees to be bound by the process set out in this RFP regarding the evaluation of Proposals.

| Step | Evaluation Stage Description | Weighting |
|------|---------------------------------------|-----------|
| 1 | Evaluation against Rated Requirements | 70 |
| 2 | Evaluation of Financial Offers | 30 |
| | Total Points Available | 100 |

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PART "C" – PROPOSAL EVALUATION

The following must be provided in the Proposal for Consideration:

| | |
|---|-----------|
| Project Schedule | Pass/Fail |
| Completed Declaration (Appendix "A") | Pass/Fail |
| Health and Safety Policy (Part "A" - #9) | Pass/Fail |
| WSIB Certificate of Clearance (Part "A" - # 9) | Pass/Fail |
| Accessibility Declaration (Part "A" - # 10) | Pass/Fail |
| Financial Appendix "B" | Pass/Fail |

Step 1 – Evaluation Against Rated Requirements (70 points)

Proposals will be evaluated and scored in accordance with the rated requirements of this RFP and the following Scoring Guide:

| Detailed Work Plan Evaluation | Point Allocation |
|---|------------------|
| Firm's Qualifications and Experience on Similar Assignments | 5 |
| Project Team's Experience | 10 |
| Project Understanding | 10 |
| Work Plan, Methodology and Quality Assurance Plan | 35 |
| Project Schedule | 10 |
| TOTAL: | 70 |

Bidders are required to achieve a minimum of 49.0 (70%) on the overall rated requirements. Failure to achieve the minimum score will render a Proposal non-responsive and will be given no further consideration.

Step 2 – Evaluation of Financial Proposals (30 points)

Only Proposals meeting all the requirements detailed in Step 1 will be considered at this point.

**THE CORPORATION OF TAY VALLEY TOWNSHIP
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PART "C" – PROPOSAL EVALUATION

Proposals will be evaluated for the "Proposal Fee" portion based on the following:

The lowest fee proposed shall be awarded the full amount of points available for the fee portion of the evaluation (30). All higher fees proposed shall be awarded points, rounded to the closest full point for the portion of the evaluation by the following:

$$\text{Awarded Price Points} = \left(\frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)}$$

For example: if the low fee is \$100,000, 2nd low fee is \$120,000 and 3rd low fee is \$200,000 their respective scoring would be as follows:

- a) The Bidder with the low fee of \$100,000 would be awarded 30 Points.
- b) The Bidder with the 2nd low fee of \$120,000 would be awarded points as follows:

$$\begin{aligned} \text{Awarded Price Points} &= \left(\frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)} \\ &= \left(\frac{\$100,000}{\$120,000} \right) \times 30 \\ &= 25 \end{aligned}$$

- c) The Bidder with the 3rd low fee of \$200,000 would be awarded points as follows:

$$\begin{aligned} \text{Awarded Price Points} &= \left(\frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)} \\ &= \left(\frac{\$100,000}{\$200,000} \right) \times 30 \\ &= 15 \end{aligned}$$

- d) This formula would be applied to the balance of proposals received.

Step 3 – Due Diligence

The Township, at its sole discretion, may conduct a due diligence phase to review the certainty, reasonableness and comprehensiveness of a Proposal. The Township may seek clarification of any of the elements contained in the Proposal and contact the project references in order to confirm the information provided. Bidders are expected to cooperate in providing clarification on any of the components of their Proposal. Proposals that fail to satisfy the due diligence phase shall not be given any further consideration.

Bidders may be required, and shall diligently do so if requested by the Township, to furnish supplemental information concerning their Proposals. Generally, diligently shall mean within 48 hours of such notice given by the Township.

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PART "C" – PROPOSAL EVALUATION

Step 4 – Selection of Successful Bidder

The evaluation team intends to recommend Proposals for authorization on the basis of “best value” to the Township, as determined by Proposals having met and passed all the preceding steps, meaning:

- achieves an overall evaluation score which meets or exceeds the Rated Requirements threshold, as outlined in Step 1;
- have passed the Financial Offer evaluation, as outlined in Step 2;
- scored the highest awarded points after adding the points awarded in Step 1 to the points awarded in Step 2 and,
- have passed the Due Diligence evaluation, as outlined in Step 3.

Step 5 – Award

Following the selection of a Successful Company, authorization of the Contract will be made in accordance with the provisions of the Township’s Procurement Policy.

Step 6 – Debriefing

Bidders are entitled to request a debriefing from the Township of how their submission was evaluated. Debriefing sessions will be scheduled by the Project Manager following Step 5 of the evaluation process. Debriefing sessions shall be conducted for the sole purpose of providing constructive and instructive feedback to a Bidder. A debriefing session will only involve a review of how the Township considered and evaluated a particular Bidder’s Proposal and will not include disclosure of any aspects of the Township evaluation of other Proposals received from other Bidders.

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APPENDIX "A" – DECLARATION

1. I, _____, of _____,
DECLARE that no person, firm or Corporation, other than the one whose signature or the signature of whose proper officers and seal is or are attached below, has any interest in this submission or in the Contract proposed to be taken.
2. **I FURTHER DECLARE** that this Proposal is made without any connections, knowledge, comparison of figures or arrangement with any other company, firm or person making a submission for the same project and is in all respects fair and without collusion or fraud.
3. **I FURTHER DECLARE** that no member of the Township Council, or any Officer of The Corporation of Tay Valley Township is or will become interested, directly or indirectly, as a contracting party or otherwise, in the performance of the Contract, or in the supplies, work or business to which it relates or any portion of the profits thereof, or any such supplies to be used therein or in any of the monies to be derived therefrom.
4. **I FURTHER DECLARE** that several matters stated in the said Proposal are in all respects true.
5. **I FURTHER DECLARE** that I have carefully examined the Request for Proposal document, and hereby acknowledge the same to be part and parcel of any contract to be let for the project therein described or defined and do all the work and to provide the services for the prices stated.
6. **I FURTHER DECLARE** that I have a clear understanding of all the work involved in this contract.
7. **I FURTHER DECLARE** that this offer is to continue open to acceptance until the formal contract is executed by the successful Company for the said project OR for a period of sixty (60) days after the closing date, whichever first occurs and that the Township may, at any time, within that period, without notice, accept this Submission whether any other Submission has been previously accepted.
8. **I FURTHER DECLARE** that the awarding of the contract based on this Request for Proposal by the Township shall be an acceptance of this Proposal.
9. **I FURTHER DECLARE** that in the event of default or failure on our part, that the Township shall be at liberty to advertise for new Requests for Proposals, or to carry out the works in any other way they deem best, and I also agree to pay to the said Township the difference between this Request for Proposal and any greater sum which the said Township may expend or incur by reason of such default or failure or by reason of such action as aforesaid, on their part, including the cost of any advertisement for new Request for Proposals; and to indemnify and save harmless the said Township and their officers from all loss, damage, cost charges and expenses which they may suffer or be put to by reason of any such default or failure on our part.
10. **I FURTHER DECLARE** that Addendum/Addenda No. _____, inclusive, has/have been received, and that all changes specified in the Addendum/Addenda have been included in the prices submitted.

Witness

Signature

Date

Name of Company

E-mail Address

Address

Name of Signing Authority for
Contract (Please print)

Telephone

**THE CORPORATION OF TAY VALLEY TOWNSHIP
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APPENDIX “B” – FINANCIAL

The Bidder offers to provide the services noted within this Proposal package and identified tasks, and as further detailed in the Company’s proposal, to the acceptance of the Township for the following Upset Cost Limit.

| Professional Fees | Disbursements | Total Cost (excluding HST) |
|-----------------------------|---------------|----------------------------|
| | | |
| \$ _____ | \$ _____ | \$ _____ |
| TOTAL PROPOSAL PRICE | | \$ _____ |
| | | |

In addition to this summary, the Bidder is required to provide a detailed price breakdown by major tasks with the Proposal. The breakdown should include the specific activities planned, the timing and associated level of effort by individual or classifications.

**THE CORPORATION OF TAY VALLEY TOWNSHIP
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APPENDIX “C” – BIDDERS CHECKLIST

To be submitted as part of the RFP.

1. Completed Declaration (Appendix “A”) ☐
2. 2020 Health and Safety Policy – Part “A” (#9) ☐
3. WSIB Certificate of Clearance – Part “A” (#9) ☐
4. Accessibility Declaration – Part “A”/Appendix “F” (#10) ☐

To be submitted upon Contract award.

1. Insurance Requirements – Part “A” (#16) ☐

**THE CORPORATION OF TAY VALLEY TOWNSHIP
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APPENDIX “D” – RFP LABEL

To help identify your RFP, please **cut out the label below and affix this label to the outside of your RFP Envelope:**

| | |
|--|--|
| THE CORPORATION OF TAY VALLEY TOWNSHIP REQUEST FOR PROPOSAL SERVICE DELIVERY REVIEW | |
| The Corporation of Tay Valley Township 217 Harper Road, Perth, Ontario K7H 3C6 | |
| Attention: | Amanda Mabo, Clerk |
| Telephone: | 613-267-5353 ext. 130 |
| Toll Free: | 1-800-810-0161 |
| E-mail: | clerk@tayvalleytwp.ca |
| CONTRACT NUMBER: | CLOSING TIME/DATE: |
| 2020-CAO-001 | 1:00 PM October 22nd, 2020 |
| YOUR COMPANY’S NAME AND ADDRESS: | |



Use the above label for your envelope when you submit your RFP Document.

**THE CORPORATION OF TAY VALLEY TOWNSHIP
REQUEST FOR PROPOSAL
SERVICE DELIVERY REVIEW**

APPENDIX “E”

[COMPANY LETTERHEAD]

To: The Corporation of Tay Valley Township

From: [Company Name]

[DATE]

[CONTRACT NUMBER, CONTRACT TITLE]

Re: Declaration of Compliance – Accessibility of Ontarians with Disabilities Act (AODA)

Please accept this letter as confirmation [COMPANY NAME] is in compliance with the Accessibility of Ontarians with Disabilities Act and its regulations.

[SIGNATURE]

[NAME]

[POSITION]

[CONTACT INFORMATION]

[COMPANY]