

# The Township of Rideau Lakes



## **Request for Proposals** **Servicing Innovation for Small Villages** **Community Characterization**

**ADMIN2017-02**

**Contents**

1.0 Information to Bidders..... 4

    General Description ..... 4

    Bid Submission ..... 4

    Registration..... 4

    RFP Schedule..... 4

    Cost of Submission ..... 4

    Right to Accept or Reject Proposal ..... 5

    Validity ..... 5

    Withdrawal of Proposal Prior to Closing..... 5

    Review of Documents ..... 5

    Multiple Proposals ..... 5

    Addenda ..... 6

    Price Submission ..... 6

    Award..... 6

    Collection of Personal Information and Confidentiality Provision ..... 6

    Standard Terms and Conditions..... 6

    Terms of Payment and Invoices..... 7

    Termination..... 7

    Background Check..... 7

    Conduct of Vendor Staff ..... 7

    Accessibility..... 7

    Insurance – Liability, Automotive and Non-Owned Automobile Insurance ..... 8

    Workplace Safety Insurance Act ..... 8

    Contractor’s Liability ..... 8

    Quality of Work..... 8

    Conflict of Interest ..... 8

    Lobbying..... 9

    Questions Regarding the Request for Proposal..... 9

2.0 Submission Forms ..... 10

    Proposal Submission Form..... 10

    Bidders Declaration Form ..... 11

3.0 – Project Background and Rational..... 12

## ADMIN2017-02

4.0 – Proposal Content.....	14
5.0 Evaluation .....	15

## 1.0 Information to Bidders

### General Description

Rideau Lakes is working to make its villages strong and viable as a part of its dedication to progressive rural governance. This project speaks directly to our strategic priorities of Village and Hamlet Vitality, Economic Development, Financial Planning and Sustainability, and Infrastructure Planning.

We have an innovative idea and want you to be a part of the solution. The Township is inviting qualified firms and individuals to provide the services as described in the project scope.

This project is in part funded by the Rural Economic Development (RED) program administered by OMAFRA, and the Eastern Ontario Development Project (EODP).

### Bid Submission

Proposals shall include the forms in Section 2, be made in the format specified in Section 3, be responsive to the project background and rationale outlined in Section 4, include the information outlined in Section 5. Proposals shall be properly labeled with the proposal number 'ADMIN2017-02' and submitted no later than the Closing Date and Time.

**Proposals are to be submitted by email to: [mdwyer@twprideaulakes.on.ca](mailto:mdwyer@twprideaulakes.on.ca).** No sealed/hard copy submission is required. **Proposals will be received until 1:00p.m. E.S.T., November 1, 2017.** It is the Bidder's responsibility to ensure that the bid submission is received by the Chief Administrative Officer (CAO) prior to the submission deadline.

**All proposals will be held in the strict confidence until after the submission deadline.**

### Registration

Individuals or firms interested in submitting a proposal should register as a Bidder with the municipality to ensure they receive any addenda which may be issued. Individuals or firms may register by contacting the CAO by email at the contact below:

Michael Dwyer  
CAO  
[mdwyer@twprideaulakes.on.ca](mailto:mdwyer@twprideaulakes.on.ca)

### RFP Schedule

Every attempt will be made to meet all dates. The Township of Rideau Lakes reserves the right to modify any or all dates at its sole discretion.

**Last Day for Questions: October 31, 2017**  
**RFP Closing Date and Time: November 1, 2017 at 1:00pm**  
**RFP Opening: November 1, 2017 at 1:30pm**  
**Selection of Successful Vendor: November 2017**  
**Project Execution: November 2017 – April 2018**

### Cost of Submission

The Township of Rideau Lakes will not be liable nor reimburse any Bidder for any costs incurred in developing a Proposal submission, attending meetings/interviews, demonstrating the goods and or

## ADMIN2017-02

services, legal services, or any other services that may be required in responding to this Request for Proposal.

### Right to Accept or Reject Proposal

The Township of Rideau Lakes reserves the right to reject any or all Proposals, as a whole or in part, and waive formalities as the interests of the Corporation may require, without stating reasons. **Therefore, the lowest or any Proposal may not necessarily be accepted. If there are a limited number of responses to this request, the Township reserves to right to terminate the request or make further requests for proposals.**

### Validity

The Proposal submitted shall remain valid for at least one hundred and twenty (120) days from the Proposal Closing Date.

### Withdrawal of Proposal Prior to Closing

A Bidder who has submitted a response to this Request for Proposal may request that such response be withdrawn. Withdrawals shall be completed and shall be allowed under the following conditions;

- 1 The RPF closing date and time has not passed; and
- 2 If the request is made in writing on the Bidder's letterhead and signed by a senior official of the Bidder. This request may be received via email or fax; or
- 3 If the request is made in person by a senior official from the Bidder who is authorized to complete and sign an appropriate form.

In all cases, a request for the withdrawal of a Proposal will be verified by the Township of Rideau Lakes, by way of a telephone call or fax to a senior official representing the Bidder, to confirm the withdrawal.

All confirmed requests for withdrawal will be placed on record. The entire response will be returned unopened, to a representative of the vendor, after the closing date of the submission. Bidders will be responsible for the pick-up of the Proposal by the day requested.

**There shall be no withdrawals of Proposals allowed after the closing date/time for receiving Proposals.**

### Review of Documents

The Bidder must personally study the entire Request for Proposal document as to satisfy himself/herself of the conditions and requirements of the Proposal. There will be no consideration of any claim, after submission of Proposals, that there is a misunderstanding with respect to the conditions imposed by the Request for Proposal.

### Multiple Proposals

Multiple responses from any one Bidder would be acceptable, providing the following conditions are met:

- 1 Each response must be complete and shall be as per the format specified herein, and shall be packaged separately;
- 2 Each response shall be dealt with separately and shall be subject to the requirements of the Request for Proposal.

### Addenda

The Township of Rideau Lakes may choose to issue addenda to provide clarification or additional information. Addenda will only be sent to vendors that have registered as Bidders. It is the Bidder's responsibility to ensure they have received all addendums and provide the Township of Rideau Lakes with the proper contact information through the registration process. Submissions must include all signed addenda acknowledgements or the submission may be disqualified.

### Price Submission

The Proposal price shall include total costs, in Canadian Dollars, including, but not limited to: labour, material, equipment, supervision, statutory charges and vendor overhead and profit.

### Award

Upon completion of evaluations, the Township of Rideau Lakes may select a Bidder with whom it wishes to undertake negotiations for the plan outlined in the Request for Proposal. Negotiations may take the form of adding, deleting, or modifying certain requirements based on the response to the Request for Proposal, and adjusting pricing accordingly if required. Assuming mutually acceptable terms and conditions can be agreed upon, a purchase order will be issued to the selected bidder.

The Township of Rideau Lakes reserves the right in its absolute discretion to:

- 1 Adjust, discontinue, or cancel the submission process, and/or commence a new process for the same or similar goods or services, if the Township of Rideau Lakes deems reasonable conditions exist.
- 2 Accept or reject any submission(s) in whole or in part.
- 3 Provide additional written information to Bidders.

**Therefore, the lowest cost Proposal may not necessarily be accepted. The acceptance and award of a Proposal shall be subject to the approval of The Township of Rideau Lakes Council.**

### Collection of Personal Information and Confidentiality Provision

Any personal information collected through the Request for Proposal process will be done so, and managed, in accordance with the *Municipal Freedom of Information and Protection of Privacy Act*. Any personal information collected is being done so for the purposes of proposal review and potential vendor selection.

All responses to this Request for Proposal will only be treated as Third Party Information and/or Economic or Other Interests in accordance with the provisions of the *Municipal Freedom of Information and Protection of Privacy Act* where **an explicit request to do so is provided in writing in the proposal**. Submission of a proposal without this explicit request shall constitute consent for disclosure in accordance with the Act.

The information contained in this Request for Proposal will be utilized by the Bidder solely for the purposes of preparing a submission. Any other use of the information for any other purpose is not authorized by the Township of Rideau Lakes.

### Standard Terms and Conditions

The Township of Rideau Lakes, maintains standard procurement Terms and Conditions that apply to this Proposal. A copy of the Township's Procurement of Goods and Services Policy – Revised March 2013 will be provided on request.

### Terms of Payment and Invoices

**The Township of Rideau Lakes terms of payment are net thirty (30) calendar days upon receipt of invoice.**

Invoices are to be forwarded as goods or services are rendered to the attention of:

Michael Dwyer  
Chief Administrative Officer  
The Corporation of the Township of Rideau Lakes  
1439 County Road 8  
Delta, ON  
K0E 1G0  
or sent electronically to: [mdwyer@twprideaulakes.on.ca](mailto:mdwyer@twprideaulakes.on.ca)

**Invoices submitted for goods not received or services not completed will be held until the date of delivery or completion prior to starting the net thirty days to payment.**

### Termination

The Township of Rideau Lakes reserves the right to terminate the contract for sufficient cause, including, but not limited to, poor performance, late deliveries, inferior quality, incorrect pricing, statutory non-compliance, and health and safety concerns. If any successful Bidder should neglect to perform the work properly or fail to perform any provision of the Request for Proposal, the Township of Rideau Lakes may terminate the contract after fifteen (15) business days with written notice to the vendor.

### Background Check

The Township of Rideau Lakes, at its discretion, may perform background checks on any service personnel, and reserves the right to refuse access to buildings or equipment to any personnel or other representatives of any successful vendor or manufacturer.

### Conduct of Vendor Staff

The successful vendor shall employ orderly, competent and skilled staff to ensure that the Request for Proposal is completed in a respectable manner. If any one person employed by the successful vendor in connection with the Request for Proposals efforts, in the opinion of the Township of Rideau Lakes is just cause for complaint, the vendor, upon notification from the Township of Rideau Lakes, shall not permit such person to continue in any future work arising out of the Request for Proposal.

### Accessibility

The Township of Rideau Lakes is required to comply with the Accessibility for Ontarians with Disabilities Act, 2005 as amended and any associated regulations.

Any successful Bidder for the completion of work with regards to this Request for Proposal must be aware of these requirements and certifies that all statutory requirements will be met at the vendor's full cost.

### **Insurance – Liability, Automotive and Non-Owned Automobile Insurance**

Without in any way limiting the liability of any successful vendor, the vendor shall:

- 1 Maintain and keep in force during the term of the contract, General Liability Insurance protecting the contractor's liability, legal or assumed, under the contract for all claims arising from personal injury to members of the public, damage to property of public including loss of use of such property and the minimum insurance shall be \$5,000,000.00.
- 2 Maintain and keep in force during the term of the contract, automobile and non-owned automobile insurance on all vehicles used in connection with the work under this contract. Such insurance is to carry the minimum limit of \$2,000,000.00.
- 3 Maintain and keep in force during the term of the contract, Contractor's contingent liability insurance, covering the liability of the Contractor under this contract in respect to his sub-contractor's same limits as required in Clause (a).
- 4 Deposit with the Township of Rideau Lakes, before commencing any work under this contract, a certificate of insurance detailing the coverage and expiry date for all policies duly executed by the insuring company stating that if said policies are cancelled or changed in any manner, sixty (60) days written notice of such change or cancellation will be given to the Corporation of the Township of Rideau Lakes, Clerk, Delta Ontario. The Township shall be shown as an additional insured.

### **Workplace Safety Insurance Act**

Any successful vendor is required to comply with all the regulations of the Workplace Safety and Insurance Board (WSIB) in respect to the contract work and all persons employed on or in connection therewith, and shall furnish a Certificate of Clearance from the Board to the Township of Rideau Lakes, and maintain good standing with the WSIB throughout the contract period.

### **Contractor's Liability**

Any successful vendor shall be liable for all injuries and/or death to persons and for damage to property caused by his/her operations and those of sub-contractors and their employees engaged on and off site; and shall indemnify and save harmless the Township of Rideau Lakes from all suits and actions for damages and costs to such damages to property of others as well as the Township, resulting from negligence, poor workmanship and materials, as well as any cause whatsoever in the performance of the work.

### **Quality of Work**

Any successful vendor at all times shall provide the Township of Rideau Lakes Representative with suitable access, and or status of the work covered under the Request for Proposal. The Township of Rideau Lakes Representative shall be the sole judge of the work and therefore of its acceptability. Work that is unsatisfactory, in the opinion of the Township of Rideau Lakes Representative, shall be made satisfactory at no additional cost to the Township of Rideau Lakes.

### **Conflict of Interest**

By submitting a bid, a Bidder declares that the submission is not made in connection with any other submitting Bidder or vendor, and is in all respects fair and without collusion or fraud and further

that no member of Council, officer or employee of the Township of Rideau Lakes has become interested, directly or indirectly, as a contracting party, partner, stockholder, surety or otherwise on the performance of the said contract.



### Lobbying

In order to ensure fairness to all Proponents, the Township must endeavour to prevent unfair advantage created by lobbying. Therefore the Township reserves the right to disqualify, at any time and at its sole discretion, any Proponent engaging in lobbying in connection with a competitive bidding process between a date that is no later than the date of issue of the RFP and the date of signing of a contract or Purchase Order between the Township and the Successful Proponent(s). The Township may disqualify a Proponent at any time in the procurement process, including after the selection process has been completed.

Lobbying may include any activity that the Township, in its sole discretion, determines has or may give an unfair advantage to one Proponent relative to other Proponents. Without limiting the foregoing, lobbying may include:

- a) Verbal or written communication with or to any Township staff / Council member other than those identified as contacts in this RFP in respect of this RFP.
- b) Verbal or written communication with or to any expert or other advisor assisting the Evaluation and Selection of this RFP.
- c) Verbal or written communication with or to any member of the RFP Evaluation and Selection team other than those identified as contacts in this RFP.
- d) Direct or indirect requests by the Proponent to any person, organization or group to provide a written or verbal expression of support not required by this competitive bidding process to any member of the Evaluation and Selection team or Council.
- e) Verbal or written communication with or to media organizations.
- f) Direct or indirect offer of gifts of any kind or value to any Township representative or personnel.

### Questions Regarding the Request for Proposal

Bidders having questions or finding discrepancies or omissions, or having doubts as to the meaning or intent thereof, shall at once notify in writing the Township of Rideau Lakes, who may send written instructions or explanations by Addenda to all vendors as required. Any questions arising from the Request for Proposal should be directed to:

Michael Dwyer  
CAO  
613-928-2345 ext. 231  
[mdwyer@twprideaulakes.on.ca](mailto:mdwyer@twprideaulakes.on.ca)

## 2.0 Submission Forms

### Proposal Submission Form

I/We have reviewed the Request for Proposal, including the Terms and Conditions, and the Council and Ward Structure Review Terms of Reference, and hereby offer to provide goods or services for the following amounts of money in exchange for the right to enact the requirements of the Proposal.

For the Provision of: Consultant Services – Servicing Innovation for Small Villages - Community Characterization

Total fixed costs for all consultant services and deliverables as outlined in the proposal	Cost (excluding HST)
	\$

Registered Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Signature of Authorized Officer: \_\_\_\_\_

Name of Authorized Officer (please print): \_\_\_\_\_

**Note for Signing Office: By my signature, I hereby confirm I am a principal, or have been duly authorized by the principal or board, to sign on behalf of the above-named organization.**

**Bidders Declaration Form**

I/We (enter name) \_\_\_\_\_

Title/Position \_\_\_\_\_

Name of Organization or Business \_\_\_\_\_

- 1) Declare that no person, firm or corporation other than the one whose signature or the signature of whose proper officers is attached below, has any interest in this proposal or in the contract proposed to be undertaken.
- 2) Further declare that this proposal is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm or person making a proposal for the same work and is in all respects fair and without collusion or fraud.
- 3) Further declare that no Township of Rideau Lakes employee, or member of Township of Rideau Lakes Council and their families is, or will become, interested directly as a contracting party or otherwise or in the performance of the contract or in the supplies, work or business to which it relates or in any portion of the profits thereof, or of any such supplies to be used therein or any of the monies to be derived therefrom.
- 4) Further declare that the several matters stated in the said proposal are in all respects true.
- 5) Further declare that I/We have examined the Project Documents and hereby propose and offer to enter into a contract to provide all of the items mentioned and described or implied therein, including, in every case, freight, duty, exchange, and to accept in full payment therefore, the sums calculated in accordance with the actual quantities provided, and unit prices attached to this proposal.
- 6) Agree that this offer is to continue open for acceptance until a formal contract is executed or a purchase order is issued to the successful Bidder.

Name of Authorized Officer (please print) \_\_\_\_\_

Signature of Witness Signature of Authorized Officer \_\_\_\_\_

Signature of Witness Signature of Authorized Officer \_\_\_\_\_

Name of Witness (please print) \_\_\_\_\_

Dated \_\_\_\_\_

### 3.0 – Project Background and Rational

#### Context

Ontario's small villages, the cornerstones of our rural way of life, are in decline. We can do something about it, we must lead change.

The Township of Rideau Lakes completed a study in 2016 called *A Fresh Look - Alternative Servicing Models for Ontario's Villages*. The report identifies the problem faced by many of Ontario's small villages that rely on individual on-site services (well and septic). The report then explores the significant economic and social opportunity offered by water and/or wastewater servicing innovation in the small village context.

The study shifts the widely held and institutionally ingrained position that services need to be centralized and municipally owned and operated, or 'big pipes and big plants'. Instead, the report underscores the need to develop solutions tailored to the unique opportunities and constraints of the village setting.

Three primary and interrelated principles surface in the report to achieve this. Together they may offer the best opportunity to leverage the benefits that services provide (economic and social flexibility and responsiveness) while being fiscally attainable and sustainable:

- 1) A 'Main Street' Focus – focus servicing efforts on the core amenities and nodes in a small village that make it livable and viable. This can include, but is not limited to commercial, institutional and more dense residential assets. Where there is no concern about aquifer quality and adequate protection measures are in place, there may be no need to service all residences, as that may increase system cost, complexity, and generate a lack of community support.
- 2) Decentralized Systems – decentralized or 'cluster' systems can take a wide variety of forms and incorporate some of the most innovative technology, policy and development tools available in Ontario and Canada. They seek to provide the best solution, where it is needed and when it is needed, and allows for optimal tailoring to the setting's context.
- 3) Partnerships – Decentralized services can be jointly established and maintained through a variety of partnership and development models. These can include private partnerships and public-private partnerships. Again, context considerate partnerships allow for optimal tailoring to the setting's context. Further, in building partnerships, you are building community capacity, communication, buy-in, and 'ownership' of the community's future.

It is believed that these principles, when combined, can help tip the balance to create vibrant main streets which will drive economic opportunity and help counter the trend of village 'hollowing out'. Further, small villages, when made viable through these principles, are ideally positioned in the rural context to support many of the Province's wider policy objectives including: affordable housing, ageing in place, walkability, active transportation, social inclusion, accessibility, community hubs, transition to a

## ADMIN2017-02

low carbon society, and growth management objectives, including, infilling, intensification and brownfield redevelopment.

### Project

Rural places suffer from a significant 'data deficit'. This report would provide 'on the ground' assessment of the salient factors that need to be considered in proposing a robust servicing solution. This will include social, economic and environmental components – such as mapping and documenting land use types, commercial square footage, days-on-market/turnover data, established nodes, assessing the 'highest and best use' of assets, housing type demand and affordability, determining local hydrology, geology and assimilative capacity etc.

The goal is to prepare a document that will adequately inform the development of decentralized solutions that speak to the specific village context and opportunity; essentially providing the data so that we can answer the question 'where do we best invest and why'.

The document will be used by firms during the second phase of work where-in a 'call for solutions' will be employed. In this way, the Community Characterization Report is a foundational and critical component of the project's overall success.

### Major Project Deliverables

The major project deliverables include:

- The Community Characterization Report and associated maps, figures, tables and data.

### Project Timeline

Project timelines are estimated, and subject to change.

- November, 2017 – firm selection;=
- November – March 2017 – start-up meeting(s), background work/site evaluation
- April 2017 – reporting and project wrap-up.

### Available/Associated Documents

- A Fresh Look - Alternative Servicing Models for Ontario's Villages (2016)
- Delta Community Improvement Plan (2013)
- Municipal Official Plan (2004) and Zoning By-law (2005)
- United Counties of Leeds and Grenville Official Plan (2016)
- Rideau Lakes – 2015 and Forward (2015) (strategic plan)
- ECA documents associated to municipally owned campground (Lower Beverley Lake Park) proposed consolidated subsurface disposal system
- Various reports on Upper and Lower Beverley Lake and watershed
- Original Village Plan
- Digital well record data (MOECC)
- Dam Safety Assessment Report (Delta Dam) (MNRF – 2016)
- Assessment and associated MPAC data

## 4.0 – Proposal Content

Each proposal document should clearly demonstrate that the consultant possesses a clear understanding of the overall scope of the project and the particulars of the assignment. Additionally, each proposal should identify the project manager and key team members (including any members from specialized sub-consultants), describe their respective capabilities and roles, and provide resumes of each where appropriate.

The proposal document should describe the approach and methodology to be followed in completing all aspects of the project as described in the Terms of Reference, and provide a detailed work plan and schedule (including a breakdown of tasks) sufficient to detail the level of effort proposed for individual team members, and a complete understanding of how the work is to be completed.

The proposal document should, as a minimum, contain the following information and material as it relates to the project background and rationale:

- a) A detailed description of your proposed approach to the development of the report, including anticipated sources of information, salient community attributes to be assessed and reported on etc.
- b) The name, size, location and description of the lead consulting firm, and in the event that any work is proposed to be undertaken in consultation with, or in association with, other consulting firms (sub-consultants), the name, size, location and description of such other firms.
- c) A list of similar projects undertaken by the lead consulting firm (and any sub-consulting firms, where applicable), including a reference contact.
- d) A list of the staff or members of the consulting team to be assigned to work on the project, their location, including a detailed outline of past experience and involvement (with dates) in similar projects.
- e) A schedule of key activities, tasks and resources, including milestones, deliverables and completion dates, and provision for the consultant to update the schedule on a regular basis and submit it to the project manager.
- f) The fixed fee shall be submitted on a spreadsheet basis broken down to indicate specified work components, together with respective staff hours, rates and costs.

## 5.0 Evaluation

Accepted proposals shall be evaluated based on a numerical scoring system. Proposals will be assigned a score for each category. Each category will be weighted as shown to reflect the goals for the proposal.

Description	Weight	Points	Maximum Total Points
<b>Qualifications, Expertise and Performance on Similar Projects:</b> <ul style="list-style-type: none"> <li>Past ability to successfully complete projects within timelines and budgets</li> <li>Stability and reputation of the firm</li> </ul>	10%		10
<b>Proposed Project Manager and Team:</b> <ul style="list-style-type: none"> <li>Past experience in directing / involvement with similar projects</li> <li>Demonstrates specialized knowledge and expertise required for the project</li> <li>Demonstrates clear understanding of project</li> </ul>	20%		20
<b>Completeness and Creativity of Proposal and Schedule:</b> <ul style="list-style-type: none"> <li>Demonstration of a consultation plan and communication plan that is appropriate for the rural and seasonal context and that will generate meaningful input and participation across a wide segment of the population</li> <li>Appropriateness of methodology and work schedule</li> <li>Demonstration of understanding of statutory and common law context and requirements</li> <li>Demonstration of ability to perform community consultation in August 2016</li> <li>Involvement and availability of key staff</li> </ul>	30%		30
<b>Knowledge of Township regarding this Project:</b> <ul style="list-style-type: none"> <li>Demonstration of understanding of the Township, its unique needs, and the challenges and opportunities related to working in a rural and seasonal context.</li> </ul>	10%		10
<b>Financial Merits:</b> <ul style="list-style-type: none"> <li>Overall cost of the submission for the services that are subject to this Request for Proposal</li> <li>Demonstration of value</li> </ul>	30%		30
<b>Total Points</b>			<b>100</b>