

## **Horton Township**



# **RFP ADMIN-2021-01**

## **SERVICES FOR DEVELOPMENT OF AN ASSET MANAGEMENT PLAN**

**Issue Date:** June 11<sup>th</sup>, 2021

**Closing Date:** July 16<sup>th</sup>, 2021 1:00 p.m. local time

**Contact:** Hope Dillabough, CAO/Clerk  
Township of Horton  
2253 Johnston Road,  
Renfrew, ON K7V 3Z8  
613-432-6271  
[cao@hortontownship.ca](mailto:cao@hortontownship.ca)

## **INTRODUCTION**

The Province of Ontario released its publication “Building Together: Guide for Municipal Asset Management Plans” in August 2012, providing very detailed specifications for the development of comprehensive Asset Management Plans by municipalities.

In an effort to meet the expectations of the Province, and to support future grant applications for infrastructure replacement, rehabilitation or renewal, the Township of Horton (herein referred to as “the Township”) wishes to engage the services of a qualified firm or individual to create an Asset Management Plan that meets or exceeds the requirements of O. Reg 588/17.

## **BACKGROUND**

Horton Township offers a unique blend of country living with nearby urban centres. Our Township borders the Town of Renfrew and is only 45 minutes away from Ottawa, Ontario - Canada's Capital. Residents enjoy the tranquility and privacy that rural properties provide and have access to the modern-day conveniences such as shopping, hospitals, theatres, schools, churches and restaurants.

According to the 2016 census, the permanent population is just under 2900 with 1385 permanent dwellings, 1173 of which are inhabited by full-time residents.

The municipal roads infrastructure consists of 36.9 km of hardtop surface and 56.2km of gravel surface. There is one active landfill site within the municipality.

The Township’s current asset registry is maintained within Microsoft Excel.

## **INTENT OF PROPOSAL**

This Request for Proposal is to provide for a comprehensive Asset Management Plan for the Township. This Asset Management Plan must be upgraded to include all asset classes that are included in O.Reg 588/17. Proponents must familiarize themselves with the requirements of the “Building Together: Guide for Municipal Asset Management Plans”, Ontario Regulation 588/17 and the AMO Federal Gas Tax guidelines and any other applicable law.

The successful firm or individual must be able to satisfy both the financial components of the work required, as well as provide engineering expertise that will be required to accurately assess asset conditions.

The current Asset Management Plan is located on the Township’s website under the following link:

<https://www.hortontownship.ca/departments/finance/asset-management-plan-8966.html>

## PROJECT SCOPE

1. The project will develop and deliver a comprehensive Asset Management Plan for the Municipality for all assets.
2. The proposal is to provide an optional Asset Management Software, including implementation, capable of planning, analysis and reporting for Asset Management and capital budgeting purposes.

The Township reserves the right to award Part 1 and Part 2 separately. The Township also reserves the right not to award Part 2 at its discretion.

## ACTIVITIES

- a. Review existing Asset Management Plan and assets;
- b. Create an Asset Management Plan compliant with current regulations;
- c. Provide non-proprietary software or software that provides minimal manual manipulation for input into current municipal financial software;
- d. Undertake public consultation process to assist with asset prioritization and levels of service policies;
- e. Find and provide data for asset inventory shortfalls;

## ASSET MANAGEMENT PLAN

The Township's Asset Management Plan must be prepared to include all asset classes that are included in the Financial Information Return. The Asset Management Plan must meet the O.Reg 588/17 regulations up to a minimum of 2022 with additional pricing to include meeting the O.Reg 588/17 regulations up to 2024 and 2025. It must also meet the requirements of the AMO Federal Gas Tax Guideline and any other applicable law.

The following provides an indication of the expectations of the Township for each topic:

### 1. **Executive Summary**

The Executive Summary should provide an overview of the plan that can be extracted for publication and/or report purposes.

### 2. **Introduction**

This section will provide sufficient detail to use as a supporting document for the Executive Summary, tying together the long-term planning documents within the municipal structure.

### 3. **Asset Management Policy**

The Asset Management Plan should identify the infrastructure spending gap. The proponent shall facilitate a session with the Township to determine and document

appropriate asset management strategies and incorporate planning for prioritization over a 10-year plan.

#### **4. State of Local Infrastructure**

- Current levels of service
- Asset (inventory) analysis
- Current performance of assets
- Lifecycle activities and costs to maintain current levels of service
- Impacts of growth on current levels of service

#### **5. Proposed Levels of Service**

- Proposed levels of service
- Proposed performance of assets
- Lifecycle activities and costs to achieve proposed levels of service
- Financial strategy
- Impacts on growth on proposed levels of service

#### **6. Integration with Existing Software or Future Asset Management Planning Software**

The Township's asset registry is maintained in MS Excel. It is essential that any software solution intended by the Proponent should seamlessly integrate with the existing asset registry or offered in a non-proprietary software that can be easily manipulated by staff or transfer to MS Excel.

#### **7. Financing Strategy**

This section is critical to the success of the Asset Management Plan in terms of Council support, implementation and on-going use. The financial strategy must be fair, reasonable and achievable and must reflect the Township's ability to pay.

The successful firm and/or individual must submit the completed study in an electronic format and paper format. The final report must be presented to the Township of Horton Council after completion of the project. A software package recommendation that can be integrated with the Township's financial software and can be utilized for capital budget purposes is required.

All municipal information provided is not to be used for any purpose other than for the project without the written permission of the Township.

The Township recognizes there are varying degrees of detail that can be provided through a study such as an Asset Management Plan. We are not looking for a Plan that barely meets Provincial and Federal requirements; neither are we looking to have a detailed plan that is onerous to build, document and maintain. The Township would prefer a reasonable level of detail, easy to understand and readily communicable to a wide variety of stakeholders including Staff, Council and Public. The 'reasonable' level of detail will be determined in part by the

asset inventory listing provided by the Township, in part by the Proponent's recommendations and in part through discussion and negotiation as the project proceeds.

## **TIMELINES**

<b><u>ITEM</u></b>	<b><u>DATE</u></b>
Issue of Request for Proposal	June 11 <sup>th</sup> , 2021
Deadline for Submission	July 16 <sup>th</sup> , 2021
Award of RFP	September 2021
Presentation of Draft Report	April/May 2022
Presentation of Final Report	May/June 2022

## **PROPOSAL SUBMITTED BY CONSULTANT**

The proposal prepared by the consultant will clearly indicate that the study will be carried out in accordance with the information outlined in this request for proposal prepared by the Township of Horton.

The consultant's proposal must contain at least, but is not necessarily limited to, the following:

- a) A work schedule showing the timing of the major tasks or milestones;
- b) The method by which your company will achieve project goals;
- c) Previous related work, highlighting your experience and expertise with similar projects;
- d) Identify the project manager and other staff (if required) and list the responsibilities of each. Qualifications of the project manager and key project staff should be outlined.
- e) Maximum total cost of the study broken down by tasks, meetings, printing costs and other disbursements listed separately, but must be included in the tender price;
- f) Hourly rates for key personnel involved in the study and an estimate of the number of hours that the project staff will spend on each specific task; and
- g) Cover sheet – the proposal must include the completed RFP Cover Sheet as provided in Appendix A.

## **PRICING AND ADDITIONAL WORK**

The consultant will provide a guaranteed maximum price for the project and shall abide by the price stated. No further payments beyond the contract amount will be made for any additional service required to provide a satisfactory deliverable. If additional requirements are requested by either Township beyond the original scope of work described in the RFP, the cost of these services would be negotiated between the Township and the company that has been selected to perform the work. Any additional work will only be undertaken based on a request in writing from the Township.

## **INVOICING**

The Township's standard terms of payment are net thirty (30) calendar days from the date of invoice. The proposal should outline any payment schedule in terms of milestones.

## **ERRORS AND OMISSIONS**

The Township will not be held liable for any errors or omissions in any part of this RFP. While the Township has used considerable efforts to ensure an accurate representation of information in this RFP, the information contained herein is supplied solely as a guideline for responding vendors. The information is not guaranteed or warranted to be accurate by the Township, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve companies from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

Should a consultant find omissions from, or discrepancies in, any of the proposal documents or should the consultant be in doubt as to the meaning of any part of such documents, the consultant should notify Hope Dillabough, CAO/Clerk, in writing, without delay. If the Township considers that a correction, explanation or interpretation is necessary or desirable, an addendum will be issued and posted on the Township's website.

No oral explanation or interpretation will modify any of the requirements or provisions of the proposed documents. All questions, errors or omissions must be brought to our attention no later than five (5) days prior to closing of the request for proposal.

## **ADDENDA**

If required, addenda will be posted on the Township's website.

[www.hortontownship.ca](http://www.hortontownship.ca)

It is the consultant's responsibility to ensure all addenda have been read and noted.

## **VENDOR EXPENSE**

Any expenses incurred by the consultant in the preparation of the proposal submission are entirely the responsibility of the consultant and will not be charged to the Township.

## **ACCEPTANCE OR REJECTION OF PROPOSAL**

The Township reserves the right to reject any or all proposals and to waive formalities as the interests of the Township may require without stating reasons.

Notwithstanding and without restricting the generality of the statement immediately above, the Township will not be required to award and accept a proposal:

- When only one (1) proposal has been received as a result of the current Request for Proposals;
- Based on price (i.e.: the lowest price);
- When all proposals received fail to comply with the specifications or proposal terms and conditions;
- Where a change in the scope of work or specifications is required; and/or
- Where the proposal documents do not state a definite work schedule and a submitted proposal is based on an unreasonable work schedule.

The Township will not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any consultant by reason of the acceptance or the nonacceptance by the Township of any proposal or by reason of any delay in the acceptance of a proposal except as provided in the proposal document.

## **PROPOSAL AWARD PROCEDURES**

The Township will notify the successful consultant of the award within sixty (60) calendar days of the proposal closing.

Notice of acceptance of the proposal will be by telephone and written notice (via email).

Following acceptance of the proposal by the Township, the successful consultant will provide the Township with any required documents within fourteen (14) calendar days of the date of notification of award.

## **PROTECTION OF WORK OR PROPERTY**

The successful consultant will provide continuous and adequate protection of all work from damage and will protect the Township's property from injury or damage arising from or on connection with this work. The successful consultant will make good any such damage or injury.

## **REGULATION, COMPLIANCE AND LEGISLATION**

The successful consultant will ensure all services and products provided in respect to this proposal are in accordance with, and under authorization of all applicable authorities, municipal, provincial and/or federal legislation.

## **CANCELLATION**

The Township reserves the right to immediately terminate the contract for sufficient cause, including but not limited to such items as non-performance, late deliveries, inferior quality, pricing problems, etc.

If the consultant should neglect to execute the work properly or fail to perform any provision of this award, the Township, after three (3) days, written notice to the consultant, may, without prejudice to any other remedy in existence, make good such deficiencies and may deduct the cost thereof from any payment then and thereafter due to the consultant. Continued failure of the vendor to execute the work properly will result in termination of the contract. The Township will provide written notice of termination.

The Township may elect to terminate the contract if the original terms and conditions are significantly changed, giving thirty (30) days written notice to the consultant. Either party may terminate the contract by giving the other party sixty (60) days written notice, giving reasons acceptable to the other and subject to approval by both parties involved in the contract.

Failure to maintain the required documentation during the term of this contract may result in suspension of the work activities and/or cancellation of the contract.

## **FREEDOM OF INFORMATION**

Any personal information required on the proposal form is received under the authority of the Township of Horton. This information will be an integral component of the quote submission. All written proposals received by the Township become a public record. Once a proposal is accepted by the Township, and a contract is signed, all information contained in it is available to the public including personal information.

Questions about collection of personal information and the Municipal Freedom of Information and Protection of Privacy Act, 1989, R.S.O. 1990, Chapter M.56 as amended, should be directed to:

Hope Dillabough, CAO/Clerk  
Township of Horton  
2253 Johnston Road,  
Renfrew, ON K7V 3Z8  
613-432-6271  
[cao@hortontownship.ca](mailto:cao@hortontownship.ca)

## **CONFIDENTIALITY OF UNDERSTANDING**

The successful consultant and its employees may have access to information confidential to the Township. This information may include, but is not limited to, terms of this agreement, business methods and systems, contractual terms, pricing, personal information, etc. subject to disclosure by force of law. The successful consultant agrees that it and its employees who



have access to this information will not either, during the term of the agreement, or at any time thereafter reveal to any third party any of this confidential information or use in any way, whether on the successful consultant's behalf or on behalf of any third party, any such information.

The obligations of this section survive the expiration or termination of this agreement indefinitely.

## **OWNERSHIP**

The information, reports, documentation, plans, etc. that are a product of this award by the successful consultant, will become the exclusive property of the Township. However, intellectual property, such as specific tools, templates, processes, etc. that the consultant has provided as part of the deliverables for this project remains the property of the consultant and the consultant is free to use any of such material in other contexts and with future clients.

## **PROPOSAL SUBMISSION**

Sealed submissions clearly marked "Request for Proposal ADMIN 2021-01 - Asset Management Plan" will be received by the undersigned until 1:00 pm on July 16<sup>th</sup>, 2021.

Submissions will be reviewed by the Township of Horton with a decision expected to be made at a regularly scheduled Council meeting, to be held in September. The project start date is expected to be soon thereafter based on the mutual agreement of both parties.

The consultant will submit three (3) paper copies and (1) electronic copy (PDF) of the above proposal to be forwarded in a sealed envelope, clearly marked, to:

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2253 Johnston Road,  
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**Appendix A**  
**Request for Proposal Cover Sheet**

Please ensure that this sheet is at the top of the Request for Proposal Submission.

PROPOSAL FOR: The Development of an Asset Management Plan

AS SUPPLIED BY: \_\_\_\_\_  
Name

\_\_\_\_\_  
Address

We the undersigned, have reviewed the Request for Proposal documents for the above-named project and hereby offer to perform the work for the following amount:

Project Costing\* to meet the O.Reg 588/17 requirements to July 2022

\$ \_\_\_\_\_ Part 1 – AMP  
\$ \_\_\_\_\_ HST  
\$ \_\_\_\_\_ Total

Project Costing\* to meet the O.Reg 588/17 requirements to July 2024

\$ \_\_\_\_\_ Part 1 – AMP  
\$ \_\_\_\_\_ HST  
\$ \_\_\_\_\_ Total

Project Costing\* to meet the O.Reg 588/17 requirements to July 2025

\$ \_\_\_\_\_ Part 1 – AMP  
\$ \_\_\_\_\_ HST  
\$ \_\_\_\_\_ Total

**PROVISIONAL ITEM:**

\$ \_\_\_\_\_ Part 2 – Software  
\$ \_\_\_\_\_ HST  
\$ \_\_\_\_\_ Total

\*Please ensure project costing includes all disbursements as noted in the RFP.

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_, 2021

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name/Title of Authorized Signing Officer

\_\_\_\_\_  
Contact Telephone Number

\_\_\_\_\_  
Signature of Authorized Signing Officer