



**REQUEST FOR PROPOSAL FOR THE SUPPLY OF:**  
**Strategic Asset Management Policy**  
**Asset Management Plan Update**

Project # 2019-11

CLOSING DATE: Friday, April 5th, 2019

TIME: 11:00:00 AM, LOCALTIME

RETURN TO: Municipality of Lambton Shores  
Janet Ferguson, Treasurer  
4 Ontario St N  
Grand Bend, ON N0M 1T0

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## 1. REQUEST FOR PROPOSAL

You are invited to submit a Proposal for the supply of a **Strategic Asset Management Policy and Asset Management Plan Update**.

The complete Request for Proposal documents are attached for your perusal. Should you have any questions regarding the documents or the process, please contact:

Janet Ferguson, Treasurer,  
Municipality of Lambton Shores  
4 Ontario St N  
Grand Bend, ON N0M 1T0

519-243-1400, ext. 8116  
[treasury@lambtonshores.ca](mailto:treasury@lambtonshores.ca)

All interested bidders are requested to complete a "Bidder Registration Form" as provided on page 14 of this document in order to be advised of any updates and addenda that may be made.

## 2. PROJECT SCHEDULE

The following is the planned schedule for this Request for Proposal process. The Municipality reserves the right to amend this schedule as it deems necessary.

Schedule of Events	Important Dates
Issuance of RFP	Friday, March 15 <sup>th</sup> , 2019
Deadline to Submit a Bid	Friday, April 5 <sup>th</sup> , 2019 @ 11:00:00 AM
RFP to be Awarded	Thursday, April 18 <sup>th</sup> , 2019
Strategic Asset Management Policy Due	Friday, May 31 <sup>st</sup> , 2019
AMP Study Completion Date	Tuesday, October 1 <sup>st</sup> , 2019

### **3. INFORMATION TO BIDDERS**

#### **3.1. CLOSING DATE AND TIME**

Sealed proposals will be accepted until 11:00:00 AM, local time, Friday, April 5th for the supply of a Strategic Asset Management Policy and Asset Management Plan Update more completely described below.

#### **3.2. NATURE OF PROJECT**

It is the intention of this request to select a supplier(s) who can provide a Strategic Asset Management Policy and update our existing Asset Management Plan.

#### **3.3. SUBMISSION**

Proposals must be typed or in ink. Proposals must be signed by an authorized individual. Proposals must be sealed in an opaque envelope/package, clearly marked as Project 2019-11. Proposals sent by e-mail, fax, arriving unsealed or arriving after the stated closing time will not be considered. All submissions are to be received at the front reception desk at the Municipality of Lambton Shores Finance office at the proposal delivery address stated below. Please note the municipal building is in a rural location and next day courier service is not always available.

Proposals must be delivered to:

Janet Ferguson, Treasurer  
Municipality of Lambton Shores  
4 Ontario St N  
Grand Bend, ON N0M 1T0

All proposals received must remain valid for acceptance up to 90 days beyond the closing date.

#### **3.4. REQUIRED NUMBER OF COPIES**

All submissions should include three (3) copies of the complete proposal.

#### **3.5. SELECTION CRITERIA**

Specific selection criterion shall be used in evaluating the proposals received. More details on the selection criteria are contained herein in Section 4.5.

#### **3.6. ACCEPTANCE AND AWARD OF CONTRACT**

The Municipality of Lambton Shores reserves the right to accept any proposal, in whole or in part, that it feels most fully meets the selection criteria. Therefore, the lowest cost proposal, or any proposal may not necessarily be accepted. Municipal staff shall evaluate all proposals received by the closing time and make evaluations and recommendations for acceptance.

### **3.7. SALES TAXES**

The quoted prices shall include HST as applicable.

### **3.8. CLARIFICATION**

Should a bidder find discrepancies in or omissions from these Proposal Documents, or should there be any doubt as to their meaning, inquiry should be made to **Janet Ferguson**, at [treasury@lambtonshores.ca](mailto:treasury@lambtonshores.ca). Should a correction, explanation, or interpretation be necessary or desirable, a written addendum will be issued to all registered bidders. Addenda issued during the period prior to the closing date of the RFP are to be considered part of these Proposal Documents.

### **3.9. WITHDRAWAL OF PROPOSALS**

Bidders who have submitted a proposal may withdraw it up to the official closing time by delivering a letter on official company letterhead requesting that the proposal be withdrawn. The letter must be signed by the same individual who signed the original proposal, or should clearly state that the individual signing has the authority to withdraw the proposal. Telephone, e-mail, fax requests, or written requests to withdraw arriving after the closing time will not be accepted.

### **3.10. RESERVATIONS**

The Municipality reserves the right to reject any or all proposals. The lowest priced bidder will not necessarily be awarded a contract.

The Municipality reserves the right to accept any proposal in whole or in parts thereof judged most satisfactory, without liability on the part of the Municipality.

The Municipality may cancel a procurement process at any time without cause if it is in the best interest of the Municipality to do so.

Irregularities contained in bids will be dealt with as outlined in schedule B of the Lambton Shores Procurement and Asset Disposal Policy.

### **3.11. QUALIFICATION OF BIDDERS**

The Municipality requires that all bidders will be able to furnish satisfactory evidence that they have the ability, experience, capital, and resources to enable them to execute and complete the contract successfully. Bidders should provide a list of similar completed projects with reference contact information.

### **3.12. SUB-CONTRACTING**

Bidders must disclose any sub-contractors that they propose to employ in the performance of this contract. Sub-contractors may not be changed after award of the contract without written permission from the Municipality of Lambton Shores.

### **3.13. PRICES AND BUDGETS**

The Municipality of Lambton Shores has a strictly defined budget for the work defined in this document and reserves the right to change the scope of this RFP to bring the proposal price within the available budget limits. Should it be determined that the changes in the scope of the RFP are of sufficient magnitude, then the Municipality shall cancel it. Then, at its discretion, the Municipality may commence a new process in order to complete the project within the budget available.

### **3.14. INVOICES**

The Municipality requires that all invoices be compliant with its requirements and general accounting principles. Bidders must agree to submit detailed invoices in a format acceptable to the Municipality of Lambton Shores. This will include but not be limited to hold back deductions calculated on the total invoice.

### **3.15. ELECTRONIC FUNDS TRANSFER**

The Municipality prefers to pay accounts via Electronic Funds Transfer (EFT). Bidders who are unable or unwilling to accept payment via this method should clearly indicate this within their response.

### **3.16. PAYMENT**

Upon the completion of any work included in this request, the successful bidder shall submit invoices for payment to comply with the contract or payment schedule to be determined in the contract documents. Payment of all invoices will be on a net 30-day basis.

### **3.17. CONTRACT AND LENGTH OF AGREEMENT**

The successful proponent's RFP submission will constitute an agreement for the term of the deliverables.

### **3.18. SUPPLIER STATUS**

The successful proponent shall be considered a supplier of services to the Municipality. At no time will the proponent, or any individual acting for the proponent, be considered an employee of the Municipality of Lambton Shores.

### **3.19. OTHER INFORMATION**

The Municipality reserves the right to require bidders to produce any of the following:

- Appropriate insurance certificates;
- WSIB clearance certificate;
- Financial and corporate information;
- Other additional assurances or protections as deemed necessary by the Municipality of Lambton Shores.



### **3.20. OWNERSHIP OF DOCUMENTATION AND FREEDOM OF INFORMATION**

The information submitted in response to this RFP will be treated in accordance with the relevant provision of the Municipal Freedom of Information and Protection of Privacy Act. The information collected will be used solely for the purposes stated in the RFP. The bidder does, by the submission of a proposal, accept that the information contained in it will be treated in accordance with the process set out in the RFP. Bidders should clearly indicate in their submission which parts, if any, are exempt from disclosure under the Municipal Freedom of Information and Protection of Privacy. Any submitted proposal shall immediately become the property of the Municipality of Lambton Shores.

### **3.21. RIGHT TO AMEND REQUIREMENTS**

Upon awarding the contract based on the information submitted in proposals received, the Municipality reserves the right to work with the successful proponent to modify any of the proposal components outlined in the RFP that are agreeable to all parties. In the event that the chosen supplier fails to act in good faith by refusing or failing to negotiate, or fails to fulfil the intent of the RFP, the supplier will be considered to have abandoned all rights and interest in the contract award and the award may be cancelled without penalty. The award may then be made to the next highest ranked bidder or all proposals may be rejected at the sole discretion of the Municipality.

### **3.22. BIDDER DISQUALIFICATION**

The Municipality may at its sole discretion disqualify a supplier from bidding on any bid solicitation as outlined in Section 32 in the Lambton Shores Policy on the Procurement and Asset Disposal.

### **3.23. INSURANCE**

At the time of execution of the contract the successful proponent shall submit:

- i) Comprehensive liability insurance providing bodily injury limits of at least \$2,000,000 (two million dollars) per person and accident and providing for property damage of at least \$2,000,000 (two million dollars) in any one incident.
- ii) Insurance as in i) for all licensed motor vehicles operated on behalf of the Consultant.
- iii) The liability insurance shall be endorsed to provide that the policy or policies will not be altered, cancelled or allowed to lapse during duration of the Contract without 30 days prior written notice to the Municipality of Lambton Shores.

- iv) The Municipality of Lambton Shores shall be added as an additional insured party, in regard to all work associated with this contract.
- v) Professional Liability insurance in the amount of \$2,000,000 (two million dollars).

The proponent clearly understands and agrees that they are not, nor anyone hired by them, covered by the Municipality under the Workers Compensation Board (WCB).

### **3.24. WORKER'S SAFETY INSURANCE**

It is the obligation of any successful bidder to comply with all requirements of the *Workplace Safety and Insurance Board Act*. Bidders must certify that all employees, officers, agents and sub-contractors are covered or exempt under the *Act*. A WSIB certificate shall be supplied at the time of contract signing and updated every 60 days in compliance with the *Act* unless an exemption is evident. Failure to supply or update this certificate as required is cause for termination of the contract.

## **4. REQUIREMENTS**

### **4.1. BACKGROUND**

On November 4, 1998, the Minister ordered that the Municipalities of the Village of Arkona, Town of Bosanquet, Town of Forest, Village of Grand Bend, and Village of Thedford amalgamate as one effective January 1, 2001. The new Municipality named “Municipality of Lambton Shores” was created and has a population of approximately 11,150 persons.

The council of the Municipality is composed of a Mayor, Deputy Mayor, and seven Councilors representing seven wards. The Council is the legislative and decision making body of the Corporation.

We have three operating offices which include the CAO/Clerks office located in Forest, the Community Services administrative office located in Northville, and the Finance Department located in Grand Bend. All offices provide full municipal services including accepting payments.

The Municipality of Lambton Shores is responsible for the provision of many services including: Fire Protection, Road Maintenance and Reconstruction, Snow Removal, Municipal Harbours, Water Distribution, Wastewater Collection and Treatment, Storm Sewers, Planning and Zoning, Cemeteries, Parks, Indoor Recreation, Outdoor Recreation, Community Centres, Library Services, Municipal Beaches, Municipal Parking, and General Administration.

Lambton Shores has completed a Water and Wastewater Financial Plan and Development Charges Study. All of which can be found on our Municipal website.

### **4.2. SCOPE**

The Municipality of Lambton Shores recognizes the importance of asset management plans and the role that they will play in long and short term decision making as well as the significance of the information to the annual and long term budgeting process. An asset management plan is a long term, living document that needs to be consistently updated as new information becomes available. Lambton Shores is looking at improving their existing asset management plan and improving the framework around collecting and maintaining asset information.

The Municipality is seeking to select a qualified consultant to assist the Municipality in developing a Strategic Asset Management Policy and updating our Comprehensive Municipal Asset Management Plan. The plan will be in compliance with the Building Together: Guide for Municipal Asset Plans and will meet the Ontario Regulation 588/17 under the Infrastructure for Jobs and Prosperity Act, 2015 requirements and deadlines.

The capital asset categories that are included in this RFP are:

- Roadways
- Water
- Wastewater
- Storm Sewers
- Bridges and Culverts
- Equipment
- Rolling Stock
- Facilities
- Land Improvements

#### **4.3. OBJECTIVES**

The objectives of the plan will include the following (but not limited to):

##### **4.3.1. STATE OF THE LOCAL INFRASTRUCTURE**

- Establish the current levels of service being provided for each asset category.
- Ensure the completeness of data for each asset category, including
  - i. The replacement cost of the assets in the category.
  - ii. The average age of the assets in the category. Review the useful life within our PSAB 3150 policy is comparable to industry standards.
  - iii. Review the asset condition and risk ratings of each asset category. Assess the current risk factors being utilized and compare to industry standards to determine if improvements can be made.
- Establish the current performance of each asset category.
- Determine lifecycle activities and costs to maintain current levels of service.
- Determine the impact of growth on current levels of service.

Deliverable: Each asset category will be assigned a replacement cost, age, condition rating, risk, current performance level and an overall priority level.

##### **4.3.2. INTEGRATION WITH EXISTING SOFTWARE**

- The Municipalities asset registry is currently maintained within Citywide's Asset Manager module. It is essential that any proposal solution intended by the Proponent should be compatible with the Citywide Software functionality.

##### **4.3.3. FINANCIAL STRATEGY AND REPORTING**

- Develop a strategy for determining how the Municipality should be budgeting annually for the replacement of assets for a minimum of 10 years.
- The financing strategy must be fair, reasonable and achievable and must reflect the Municipalities ability to pay.
- Comment and provide recommendations on existing reserve fund breakdowns to be more consistent with standard municipal practice.

## **4.4. PROPOSAL CONTENT**

The proposal must provide the following mandatory information:

### **4.4.1. GENERAL REQUIREMENTS**

The proposal should provide a work schedule outlining the approach/methodology to be used and include a detailed timeline for each major study component. The Strategic Asset Management policy must be completed by Friday, May 31<sup>st</sup>, 2019 and the Asset Management Plan by Tuesday, October 1<sup>st</sup>, 2019. Also, include a list of required information to be provided by Municipal Staff.

### **4.4.2. FIRM QUALIFICATIONS AND EXPERIENCE**

The proposal should demonstrate the qualifications of the firm as well as a brief description of the staff member(s) and the relevant experiences and qualifications of each individual along with their anticipated contribution to the study.

### **4.4.3. REFERENCE**

Please provide a list of three municipal clients as references. Include the contact person, address, telephone number and email.

### **4.4.4. FEES FOR SERVICE**

Please include an exact cost and a breakdown including itemization of costs for the various phases or components of the plan as well as rates for any requested additional work beyond the written agreement. Lambton Shores will not be responsible for expenses incurred in preparing and submitting the proposal.

## **4.5. SELECTION CRITERIA**

Proposals will be evaluated using the following weighted criteria:

<b>Component</b>	<b>Description</b>	<b>Percentage</b>
Overall Impression	The overall quality and depth of the proposal	5%
Qualifications	The respondent will be evaluated based on the range of its capabilities, the depth / strength of its organization structure and the qualifications of the individual team members.	15%
Experience	The respondent's experience will be evaluated based upon its past history of successfully providing similar services. References may be contacted in order to verify satisfactory performance on similar projects.	20%
Proposed Approach	The respondent will be evaluated based upon the proposed approach to the project, including work plan / timelines and deliverables.	35%
Professional Fees		25%

## 5. BIDDER REGISTRATION FORM

### INFORMATION TO BIDDERS DOWNLOADING THIS DOCUMENT

Bidders downloading this document from the Municipality of Lambton Shores website must register to be added to the Bidders list. Interested Bidders are required to complete the information below and return this form via fax or email to:

519-238-8577 or [treasury@lambtonshores.ca](mailto:treasury@lambtonshores.ca)

Bidders who do not register may not receive any additional information or addendums relating to this project.

Bidder Registration Form	
Required Information	To be completed by Bidder
Company Name:	
Address:	
City:	
Contact Name:	
Phone Number:	
Fax Number:	
Email Address:	
Project No. / Name:	2019-11 Strategic Asset Management Policy and Asset Management Plan Update

Return by fax to 519-238-8577 or by email to [treasury@lambtonshores.ca](mailto:treasury@lambtonshores.ca)