



REQUEST FOR PROPOSAL
To Provide
Asset Management Plan Update Services
To the
Corporation of the Township of Stone Mills

RFP #2025-01

To be delivered to:

Township of Stone Mills
4504 County Road 4
Centreville, ON
K0K 1N0
Attention: Public Works

By: 3:00 PM

Thursday, April 30th, 2025

Request for Proposal
Asset Management Plan Update Services

Your organization is invited to submit a proposal for the provision of Proposal for Asset Management Plan Update Services to the Corporation of the Township of Stone Mills for a fixed term.

Project Purpose & Objectives

Home to approximately 7,700 people, the Township of Stone Mills is located in eastern Ontario west of the City of Kingston and North of the 401. A rural municipality, respectful of its history and culture, offering a variety of residential, recreational and commercial opportunities that provides its residents, businesses and visitors with a full range of services while promoting a healthy lifestyle, high community standards, business success, accountability and transparency and prosperous relationships.

The Township of Stone Mills (“Township”) appreciates your interest in this Request for Proposal (RFP). By submitting a proposal, Proponents agree they shall not have any claims for any compensation of any kind whatsoever, as a result of participating in this RFP.

In summary, this RFP is issued solely for the purposes of obtaining proposals. Neither the issuance of this RFP nor the submission of a proposal implies any obligation by the Township to enter into any agreement. The intent of this RFP is to identify those vendors capable of meeting the Township’s requirements and with whom a final agreement may be negotiated.

THE PROCESS

1. **Submission of Proposals**

Two copies of the proposal must be submitted, in a sealed envelope / package and addressed to:

Township of Stone Mills
4504 County Road 4
Centreville, ON
K0K 1N0
Attention: Public Works (RFP #2025-01)

The proposal must be received no later than 3:00pm on Thursday, April 30th, 2025

All proposals must be submitted in sealed envelopes / packages that are clearly marked “Proposal for Asset Management Plan

Update Services for the Corporation of the Township of Stone Mills (RFP #2025-01)", and your organization's name must appear on the envelope / package. The proposal must be prefaced with a signed and dated cover letter clearly stating the name and telephone number of a contact person with the organization.

Late submissions will not be considered. Proposals received past the time stated above will not be considered, and will be returned to the bidder unopened.

E-mail, fax or telephone submissions will not be accepted.

All proposals received shall remain in force and be irrevocable until October 31, 2025.

All pricing shall be expressed in Canadian funds, be based on an agreement term of five years with no escalator clauses or other qualifications and be inclusive of all fees, including third party fees. All rates quoted, whether fixed or variable, shall remain firm for the duration of the agreement term of five years.

2. Rights reserved by the Corporation of the Township of Stone Mills

Submission of a proposal indicates acceptance by the organization of the conditions in the Request for Proposal, unless clearly and specifically noted otherwise in the proposal and any contract between the Corporation of the Township of Stone Mills and the organization(s) selected.

The Corporation of the Township of Stone Mills reserves the right to terminate the contract due to unsatisfactory service as deemed by the Township, due to budget constraints, or for any other cause as reasonably determined by the Township.

The Corporation of the Township of Stone Mills is not responsible for any costs incurred by the organizations in the preparation of their proposal or attendance at any meetings or selection interviews.

The Corporation of the Township of Stone Mills will not be held liable for any actions of the organization and / or its employees.

The Corporation of the Township of Stone Mills, at its sole discretion, reserves the right to either accept in whole or in part or

reject any proposals. The existence of this RFP shall not, in any way, obligate the Township to take any action regarding any response submitted by a supplier to this request

Notwithstanding any other provision in this request for Proposal, The Corporation of the Township of Stone Mills reserves the right in its sole, absolute and unfettered discretion to:

- a. make public the names of any or all proponents and their quoted price;
- b. request written clarification or the submission of supplementary written information in relation to the clarification request from any proponent and incorporate such response to that request for clarification into the RFP;
- c. consider during the evaluation of RFPs and/or adjust a proponent's scoring and/or reject a proponent's RFP on the basis of:
 - i. a financial analysis;
 - ii. information provided by references;
 - iii. the proponent's past performance on previous contracts awarded by the Township of Stone Mills;
 - iv. whether the proponent or any affiliate, principal of or entity associated with the proponent is presently or has ever been involved in litigation or threatened litigation with the Township of Stone Mills;
 - v. the information provided by a proponent pursuant to the Township of Stone Mills exercising its clarification rights under this RFP process; or
 - vi. Any other information deemed relevant by the Township of Stone Mills that arises during the RFP process;
- d. verify with any proponent or with a third party any information set out in a RFP;
- e. check references other than those provided by any proponent;
- f. disqualify any proponent whose RFP contains misrepresentations or any other inaccurate or misleading information, or any qualifications;
- g. disqualify any proponent or the RFP of any proponent who has engaged in conduct prohibited by this RFP process;
- h. make changes, including substantial changes, to this RFP provided that those changes are issued by way of addenda in the manner set out in this RFP;
- i. select the proponent other than the proponent whose RFP reflects the lowest cost to the Township of Stone Mills or the highest overall score;

- j. cancel this RFP process at any stage;
- k. cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables;
- l. accept or reject any or all RFPs in whole or in part;
- m. accept any irregular or non-compliant RFP;
- n. discuss with any proponent different or additional terms to those contemplated in this RFP; or
- o. if a single RFP is received, reject the RFP of the sole proponent and cancel this RFP or enter into direct negotiations with the sole proponent.

3. Selection Committee

The selection committee will be comprised of the Treasurer, Chief Administrative Officer, Public Works Manager or Supervisor, and the Chief Building Official. This committee will review the proposals, meet if required with representatives of the organizations to discuss their proposal.

4. Contact

For further information regarding this Request for Proposal, please contact Jeff Thompson, Public Works Manager at submit@stonemills.com. Please address all questions by email so other candidates can be provided with the same answers.

Respondents finding apparent discrepancies and / or omissions in the RFP should notify Mr. Thompson at once. Respondents may be advised by Addenda of any additions, clarifications, deletions or alterations to these specifications, although no Addenda shall be issued after April 17, 2025. All such changes should be covered in the respondent's proposal.

GENERAL INFORMATION ON TOWNSHIP ASSET MANAGEMENT PROGRAM

1. Background

Asset management planning is the process of making the best possible decisions regarding the building, operating, maintaining, renewing, replacing, and disposing of assets to maximize benefits, manage risk and provide satisfactory levels of service to the public in a sustainable manner. The Township of Stone Mills is committed to compliance with the

legislated requirements of Ontario Regulation 588/17 (O.Reg. 588/17) and continuous improvement related to asset management planning. The Township completed its Strategic Asset Management Policy in 2022. The Township has a consolidated Corporate AMP to provide a comprehensive overview of the Town's asset management. The current plan requires update and expansion to comply with current and future regulatory requirements. Our plan and platform are shared with the county of Lennox and Addington.

To facilitate the update to the current AMP, this project will:

- update existing service AMPs for changes in the assets up to Dec 31, 2024
- update existing service AMPs for any changes in condition ratings
- update existing service AMPs for any changes in service levels
- update existing service AMPs performance measures results

The Township is currently in the process of updating its assets registers in the CityWorks asset management software working with the County of Lennox and Addington. All captured data from this project must be retained and reflect in the asset management software upon completion of this project.

2. Scope and Services

The Township is inviting proposals from respondents for the provision of professional services to ensure the Township's Asset Management Plan is compliant with the O.Reg. 588/17 requirements phase 4, and to conform with the Provincial Guidelines for asset management planning as detailed in the Building Together Guide. Additionally, the professional services are required for the consolidation of all of the service area AMPs into the Corporate AMP and the preparation of an executive summary for the Corporate AMP.

The professional services required, as described in this section, will ensure that the Provincial requirement for asset management planning are met as a minimum and include the following key elements:

A. Service area AMPs:

- review existing plans and provide any recommendations for improvements
- for each asset category and for the subsequent 10 years, develop an estimate of the capital expenditures and significant operating costs related to lifecycle activities required to maintain the current levels of service to accommodate projected increases in demand

caused by growth, including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets

- for each asset category, the proposed levels of services for the subsequent 10 years in accordance with the qualitative descriptions and technical metrics as required by the Regulations and/or determined by the Town. An explanation of the appropriateness of the chosen proposed levels of service with the associated risks of long-term sustainability, as well as an assessment of the ability to achieve and afford.
- for each asset category, the proposed performance for the subsequent 10 years in accordance with the established performance measures
- for each asset category, a lifecycle management and financial strategy for the subsequent 10 years to provide the proposed levels of service including an estimate of the annual costs and funding projections, providing a risk assessment for any lifecycle activities not intended to be completed given a funding shortfall.
- for each asset category, develop an estimate of the capital expenditures and significant operating costs and projected funding by source to accommodate projected increases in demand caused by population and employment growth, including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets.
- for each asset category, the funding project to be available, by source, as a result of population and economic activity
- for each asset category, develop an overview of the risks associated with the implementation of the asset management plan and any actions that would be proposed in response to those risks
- prepare a scenario analysis for capital funding maintained at historical levels, at recommended levels, and at another level as determined by the successful proponent and staff

B. Corporate AMP

- establish consolidated information from the updated service areas: IT, fleet, parks & facilities and updated utilities, roads & fire

- prepare an executive summary for the Corporate AMP that can be extracted for publication and/or reporting purposes that include but are not limited to key statistics relating to the replacement costs, condition profiles, infrastructure deficit, recommended annual reinvestment required, and total reinvestment required.

C. Council Presentation

- Prepare slide deck and presentation material for Council
- Presentation of the staff-approved report and material to Council

D. Information provided to staff

- Provide all data to staff in CityWorks compatible data files, or another acceptable format, or work directly in CityWorks
- Provide opportunities for staff to learn modelling methodologies
- Provide support in training staff in order to maintain the plan moving forward.

2. Project Documents

The following documents are included to assist proponent's planning to submit a proposal:

- Ontario Regulation 588/17
(<https://www.ontario.ca/laws/regulation/170588>)
- Building Together Guide, Province of Ontario
(<https://www.ontario.ca/page/building-together-guide-municipal-asset-management-plans#:~:text=In%20Building%20Together%2C%20the%20province,to%20the%20most%20critical%20needs>)
- Township of Stone Mills Strategic Asset Management policy
(https://www.stonemills.com/media/tlkjdibp/asset_management_plan_2022.pdf)

PROPOSAL CONTENT / EVALUATION PROCESS

The proposals will be evaluated on the basis of the information provided by the organization in response to the criteria as included in this request for proposals. In the preparation of your proposal, please ensure that you fully address the requested services as included in this RFP.

Consideration will also be given to the bidder's ability to provide information on innovative service and products providing cost efficient alternatives to the Township's current operations.

At the Selection Committee’s discretion, bidders may be invited to present their proposal for the purpose of providing clarification and answers to questions by the Committee.

AODA Standards of Accessibility Compliance

Information and communications (without limitation, documents, materials, and presentations) provided to the Township as part of the Scope, which shall be posted to the Township’s website shall be provided in an AODA compliant format, specifically without limitation, meaning that the said documents must conform to World Wide Web Content Accessibility Guidelines (WCAG) 2.0 Level AA.

Project Timeline

RFP Timetable

Item	Date
Issue Date of RFP	March 20, 2025
Deadline for Questions	April 10, 2025
Deadline for Issuing Addenda	April 17, 2025
RFP Submission Deadline / Closing	April 30, 2025
Anticipated date of entering into contract	May 23, 2025
Completion of AMP update and consolidation	December 15, 2025
Council Presentation and approval	Before December 1, 2025

*The RFP timetable is tentative only and may be changed by the Township at any time.

Contract Term

This Agreement shall commence upon execution of the agreement and shall continue until the Township is satisfied that the requested work has been successfully completed and delivered. For clarity, the anticipated completion date is prior to December 15, 2025.

CONTRACT AWARD

The Corporation of the Township of Stone Mills reserves the right to accept any proposal submitted, or reject any or all proposals.

Any proposal submitted that is either not in complete compliance with the requirements of the proposal documents or does not fully address the Information as requested in this RFP may be accepted or disqualified at the option of the Township.

Proposal Evaluation and Criteria Ranking Sheet

Summary of Rated Criteria

The following is a summary of the rated criteria and weightings for the evaluation of proposals. If a minimum threshold is identified, Proponents who do not meet the minimum threshold score will not proceed to the next stage of the evaluation process.

Evaluation Criteria	Points Available
Stage I - Mandatory Requirements Provided	Yes/No*
Stage II - TECHNICAL PROPOSAL	
1. Qualifications & Expertise	30
2. Previous Experience & Performance	30
3. Proposed Approach & Methodology	30
4. Proposed Schedule & Township Staff Involvement	30
5. Value Added Elements	10
SUBTOTAL - Technical Points	/130
<i>Only those submissions receiving a minimum score of 70% (91 or more out of 130) in Stage II will proceed to Stage III</i>	70%
Stage III - PRICE PROPOSAL (See Appendix C for details)	/30
Total Available Points	/160

***If “NO”, the proposal has not met the minimum requirements and is disqualified.**

Content of Proposals and Evaluation Criteria

Stage II – Technical Proposal

In order to receive full consideration during evaluation, proposal submissions should respond to the requested information as identified and in the order shown below. Not following the sequence order creates a risk to the proponent that even if the information is provided, it may be overlooked and consequently not considered in the evaluation of the proposal response.

NOTE: Ensure no pricing information is included in the Technical Proposal submission. All pricing will be kept in a separate schedule in its own sealed envelope. **Any pricing information that is included in the Technical Proposal may result in the automatic rejection of the Proposal.**

Letter of Introduction

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1-Qualifications & Expertise (30 Points)

Each proponent should provide the following in its proposal:

- a) A brief description of the proponent;
- b) A description of its knowledge, skills, and experience relevant to the deliverables;
- c) The proponent's availability to be onsite in Centreville for critical project components; and
- d) The roles and responsibilities of the proponent and any of its agents, employees and sub-consultants who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise.

2-Previous Experience & Performance (30 points)

Each proponent is required to provide information regarding previous experience providing similar services. Each proponent is required to provide three (3) examples of asset management plans for comparable municipalities.

3-Proposed Approach & Methodology (30 Points)

Each proponent is required to provide a detailed proposed work methodology. This portion of the proposal should include the proposed course of action for the project.

4-Proposed Schedule & Township Staff Involvement (30 Points)

Each proponent should provide the following in its proposal:

- a) Provide a proposed schedule including key milestones and detailed breakdown for the project. Include a Person-hours matrix without Rates, outlining the hours each team member has allocated to each of the tasks in the proposed work plan.
- b) Detail what involvement will be required by Township Staff.

5-Value Added Elements (10 Points)

Each proponent is invited to provide any value-added elements that may be included within the proposal or at an additional cost to be considered by the evaluation committee.

References (Pass/Fail)

Each proponent is requested to provide three (3) references from similar contracts held within the last five (5) years.

The reference checks will be completed for the highest scoring proponent only. Should the highest scoring proponent receive one or more negative or concerning reference(s), the Township, at its discretion, may remove the proponent and proceed to the next highest proponent.

Presentation/Interview

The Township may, at its sole discretion, carry out interviews with proponents.

At the Townships sole discretion, the selected proponent(s) may be invited for an interview, to provide an overview of their proposal submission, and to answer any questions posed by the Township in order to clarify the proponent’s submission.

The Township reserves the right to adjust technical scores as a result of information shared during the interview.

Stage III - Price Proposal

A fee calculation will be made to allocate points up to 30%. A maximum of 30% of the total evaluation points will be assigned to cost. A formula will be used where the lowest bid is awarded full points and each other bid is calculated against the lowest bid.

Example:	Low Bid \$40,000	Other Bid \$50,000
	Low Bid = [Subject]	<u>40,000</u> x [Subject] =
[Title] points		50,000
Based on this calculation, the Low Bid of \$40,000 would receive [Subject] points and the Other Bid would receive [Title] points.		

Scoring Matrix

Each of the evaluation criteria will be given a score as indicated in the table below:

Scoring Category	Description	Numeric Score
Unacceptable	Response does not address requirements.	0
Unsatisfactory	Response is missing key requirements and/or is unable to demonstrate the required experience or abilities	1-5
Poor	Meets a limited or marginal level of the requirements. Response provides limited amount of information and/or does not clearly demonstrate the experience or abilities required.	6-10
Fair	Meets some of the requirements. Response provides most information requested and/or does not demonstrate all levels of experience and abilities required.	11-15
Good	Meets all requirements. Response provides all information requested and/or demonstrates proficiency in relation to experience and abilities.	16-20
Very Good	Meets all requirements. Responses provides all information requested in a clear and/or concise manner and demonstrates superior experience and abilities.	21-25
Exceptional	Meets all requirements and exceeds them in multiple areas in a way that is beneficial to the Town.	26-30

Proponents must be capable of completing all required tasks, as outlined in this request for proposal. The Township will not consider partial submissions.

Acceptance of Proposal

Proposals must be submitted on or before the Submission Deadline. Proposals submitted after the Submission Deadline will be rejected.

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

The Township reserves the right in its total discretion to accept or reject any or all proposals for any reason whatsoever, and to accept or reject any proposal if considered best for the Township. All documentation is subject to review by staff

for mathematical accuracies and compliance with the specifications, terms, and conditions.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent's proposal.

Negotiations, if any, must be successfully concluded and documented before a final recommendation is made. The first ranked Proponent, having acceptable terms and conditions as outlined in this RFP will be recommended for award.

No announcement concerning the successful proponent will be made until a written recommendation is prepared and approved in accordance with the Procurement By-law.

The Township will notify the successful consultant in writing of the acceptance of its proposal. The successful consultant shall be bound to execute an agreement with the Township within fourteen (14) days of contract award. The date of the contract award shall be taken as the date on which the consultant is notified of the acceptance of its proposal. Notice of acceptance will be deemed to have been given on the fifth day following the date of mailing of the written notice.

3.2 Pre-Conditions of Award

If the Township selects a Proposal, it shall issue a letter to the selected proponent requesting documented evidence of the proponent's compliance with the following conditions prior to executing the Form of Agreement:

- Insurance Certificate – Upon selection and prior to award, the selected proponent must provide a current Certificate of Insurance as detailed in the Form of Agreement.
- WSIB Certificate – Upon selection and prior to award, the selected proponent must provide a current Certificate of Clearance from the Workplace Safety and Insurance Board.
- Electronic Funds Transfer (EFT) – The selected proponent will be required to submit a completed EFT Authorization Agreement Form if not already on file.
- Costed Time Task Matrix – Prior to award, the selected Proponent will be required to provide the Township with a Costed Time Task Matrix that matches the uncosted time task matrix provided in the submission. The Costed Time Task Matrix total shall match the subtotal provided in the submission bid price.

All documentation must be provided within fourteen (14) days of the request.