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**The Corporation of The
Township of North Stormont**

REQUEST FOR PROPOSALS

for the

Purchase of Asset Management Software

RFP #2023-FIN001

May 2023

Issue Date – May 10th, 2023

Closing Date – June 30th, 2023

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1.0 Introduction

The Township of North Stormont, herein referred to as “The Township”, is located in Eastern Ontario within the United Counties of Stormont, Dundas, and Glengarry. The Township is comprised of rural and agricultural lands, three (3) vibrant and growing urban settlement areas; Finch, Crysler, and Moose Creek, and three (3) rural settlement areas; Berwick, Avonmore, and Monkland. The 2021 Census profile estimates that the Township has a population of approximately 7,400 persons and 2,949 private dwellings.

The Township’s Road network is made up of approximately 693 kilometres (km) of road surface, or approximately 347 centre line kilometres. There are many municipal drains, bridges, major and minor culverts throughout the Township boundaries. Municipal water and sewer services are provided in three (3) of the Township’s urban settlement areas. The Township also operates multiple Fire Departments, fleet & equipment, Recreation Centres and facilities, parks, and outdoor pools.

2.0 Project Overview

2.1 Purpose

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified proponents to provide professional services to supply, install/setup, and provide training for software that will maintain our tangible capital assets (TCA), as well as provide an efficient tool for future and current capital planning and analysis going forward.

2.2 Scope, Requirements, and Features of Software

2.2.1 General Provisions

2.2.1 General Provisions		YES	NO
I.	Provide initial training for municipal staff for software application and ongoing support as required.		
II.	Provide a secure and confidential web-based solution		
III.	Allow for multiple users		
IV.	Provide for information security via access restrictions based on approved levels of access		
V.	Software must have the ability to import the existing information which is available in Excel format without the need to manually enter asset information		
VI.	Software must be able to supply user friendly reports that comply with PSAB3150 Requirements		
VII.	Software provides for an Internal web hosted solution (on Township's server)		
VIII.	Software provides for an external web hosted solution (on vendor's server)		
IX.	The core of the proposal must consist of commercial, off-the-shelf Enterprise Asset Management software. A fully custom coded solution is not acceptable; however, custom configuration of commercial off-the-shelf software is acceptable.		

2.2.2 Asset Management

2.2.2 Asset Management		YES	NO
I.	Maintain an asset inventory that can hold an infinite number of assets		
II.	Allow for various methods of searching assets (e.g., on a functional and departmental basis, replacement dates, etc.)		
III.	Allow assets to be grouped or connected with other related assets without needing to be set up in more than one area (e.g., a road section with a buried water main, sewer main, culvert, etc.)		
IV.	Allow for the Estimated Useful Life (EUL) of an asset to be inputted based on each asset category and sub-category		
V.	Allow the remaining EUL of an asset to be adjusted based on condition information and inspection results		
VI.	Allow for betterments and write-downs to an existing asset which will adjust the EUL information, without affecting past amortization		

2.2.2 Asset Management		YES	NO
VII.	Establish and/or merge a pre-existing system of unique asset identification numbers to be assigned to each asset		
VIII.	Establish an asset hierarchy structure which includes asset class, category, sub-category, asset name and/or description, EUL, threshold and method of depreciation, condition, risk, and levels of service; that will comply with O. Reg 588/17		
IX.	Supports a variety of asset condition rating systems, including ability to calculate condition ratings based on deterioration curves, as outlined by the Asset Management Plan or Policy		
X.	Calculate amortization based on the straight-line method or other methods as outlined by our Asset Management Policy should it be amended		
XI.	Software is able to customize both user defined and default fields		
XII.	Supply current index tables and annual updates as required		
XIII.	Software is able to estimate future replacement costs of assets using inflation factors, historical costs and the estimated replacement dates		
XIV.	Software has the capability to attach documents related to the asset such as invoices, manuals, drawings, and photos		
XV.	Software is able to support and maintain a database of all changes, inspections, evaluations and general information of all assets during the asset life cycle		
XVI.	Proven integration with ESRI Geographic Information System for asset records and attribution, property owner information, and civic addresses.		
XVII.	Two-way interaction with ESRI Geographic Information System to graphically represent the asset data in a spatial context.		

2.2.3 Specifications for Capital Planning & Analysis

2.2.3 – Capital Planning, Reporting & Analysis		YES	NO
I.	Offer projections of life cycle management renewal and/or replacement scenarios to forecast future performance, service levels, and “what if” analysis		
II.	Ability to model various long-term financial strategies (e.g., Funding optimization and requirements, project prioritization)		
III.	Ability to track debt schedules (as required), including yearly principal/interest payments made		
IV.	Provides an annual report for all TCA showing additions, disposals, betterments and work-in-progress at historical costs (as a part of PSAB 3150 requirements) including auto-calculations of net book values and current year depreciation		
V.	Evaluation of overall existing asset risk score. This will include a computation tool to quantify risk scores for assets as this will drive the Township for a) Investment Planning b) Maintenance Planning c) Emergency Response d) Insurance purpose.		
VI.	Built-in risk model that can determine the likelihood and consequence of asset failure based on customizable factors and weighting, including climate change impacts.		
VII.	Offers work order maintenance solutions or programs to track and report the activity of the primary asset and all associated assets.		
VIII.	Reports on established levels of service statements and performance measures in order to benchmark current service against industry best practice.		

3.0 RFP Instructions

3.1 Proposal Submission

Proposals may be submitted by email and/or hardcopy until the Closing Time specified. It is the Proponent's sole responsibility to ensure its Proposal is received at the address or email set out above by the Closing Time. The Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the RFP program title, and be addressed to the following:

**Treasurer, Township of North Stormont
P.O BOX 99, 15 Union Street
Berwick ON, K0C 1G0**

Email submissions are to be sent to:

cwheeler@northstormont.ca

Proposals are to be received no later than 12:00 noon local time on June 30th, 2023. Proposals will be opened publicly. The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to, delays in transmission between the Proponent's computer and the Township's email system.

Proponents wishing to make changes to their Proposals after submission but prior to the Closing Time may do so by submitting the revisions by email or hard copy to the address above. It is the Proponent's sole responsibility to ensure their revisions were received, at the e-mail or address set out above, prior to the Closing Time.

3.2 Proponent Overview

Proponents are to provide an overview of their organization and evidence that their company can complete the RFP requirements as set forth in this RFP citing recent projects of similar scope and technologies and include particulars such as full legal company name, year the business was established, and the number of people currently employed.

A pricing schedule is required as part of the Proponent's submission, as outlined in Section 6.2 of this RFP.

3.3 Proponent's Member Qualifications

Upon acceptance of a proposal, proponents are asked to provide a complete list of the personnel that will be assigned to the project including a description of their background and qualifications.

3.4 Proponent's References

Proponents are asked to provide a minimum of three (3) references which involved projects undertaken of similar scope to that in this RFP and include information such as company name, contact person, contact telephone number and dates of service.

References of the shortlisted vendors may be contacted by members of the Township selection team prior to contacting the vendors themselves.

3.5 Charges

All basic background information from the Township will be provided at no cost. All expenses incurred by the Proponent in preparation and submission of this Proposal are to be borne by the Proponent, with the express understanding that no claims for reimbursements against the Township will be accepted. The Township shall not be responsible for any costs involved in or associated with any meetings, discussion or negotiation following submission that could lead to acceptance of the Proposal and award of a contract.

3.6 Acceptance and Award Procedures

The Township will develop a shortlist of vendors that it believes best fits the selection criteria.

All those who submit a proposal represent that they have read, understand and accept the terms and conditions of the Request for Proposal in full. The Township of North Stormont reserves the right to accept any proposal in whole or in part that they deem most fully meets the selection criteria or not to accept any or all proposals without liability on the part of the issuer and without stating reason.

3.7 No Contract

This RFP is not a tender and does not commit the Township in any way to select a preferred Proponent. By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on the Township by this RFP or submissions prior to the completed execution of a formal written Contract.

3.8 No Obligation to Proceed

The Township fully intends at this time to proceed with the proposed project, however the Township is under no obligation to proceed to award of the Contract. The receipt by the Township of any information (including any submissions, ideas, plans, drawings, models or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the Township.

There is no guarantee by the Township that the process initiated by the issuance of this RFP will continue, or that this RFP process or any RFP process will result in a Contract with the Township for the purchase of the equipment, service, or project.

3.9 Negotiation with Preferred Proponent

The Proponent that submits the most advantageous Proposal may be awarded the Contract. The Township reserves the right to accept or reject all or parts of the Proposal, however, the Township is not precluded from negotiating with the preferred Proponent to modify its Proposal to best suit the needs of the Township.

The Township will enter into negotiations with a preferred Proponent to finalize any scope changes necessary to implement the project, as generally described in this RFP. If the Township considers that it is unlikely to settle such agreements with the preferred Proponent despite having negotiated with the preferred Proponent, the Township is entitled to cease negotiations with the preferred Proponent and to begin negotiations with another Proponent.

3.10 Proposal Evaluation

The Township recognizes that “Best Value” is the essential part of purchasing a product and/or service and therefore the Township may prefer a Proposal with a higher price, if it offers greater value and better serves the Township’s interests, as determined by the Township.

The Township, at its sole discretion, reserves the right to:

- reject any or all Proposals whether complete or not,
- reject any Proposal it considers not in its best interests,
- waive any minor irregularity or insufficiency in the Proposal submitted,
- not be liable for misunderstandings or errors in the Request for Proposals,
- issue addenda to the Request for Proposals,
- contact references provided by the Proponents,
- retain independent persons or contractors for assistance in evaluating Proposals,
- request points of clarification to assist the Township in evaluating Proposals,
- negotiate changes with the successful Proponent,
- award separate contracts for separate work components, and withdraw the Request for Proposals, over a Proposal with a lower price.

The Township will ask the vendor to schedule and provide a live demonstration of their product in-person or via Microsoft Teams, Zoom, or other similar web conferencing solution as is suitable to the vendor.

3.11 Errors and Omissions

The Township of North Stormont will not be held liable for any errors or omissions in any part of this Request for Proposal (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.

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 vendor should notify the Treasurer or the Township of North Stormont or designate without delay. If the Township of North Stormont considers that a correction, explanation or interpretation is necessary or desirable, an addendum will be issued and posted on the Township's website (www.northstormont.ca).

No oral explanation or interpretation will modify any of the requirements or provisions of the proposal documents.

3.12 Regulation, Compliance & Legislation

The successful candidate 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 and are produced in conformity with Web Content Accessibility Guidelines 2.0 Level AA and shall be provided in accessible Word, Excel and PDF etc.

3.13 Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)

The information submitted in response to this RFP will be treated in accordance with the relevant provisions under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA). The information collected will be used solely for the purpose stated in the Request for Proposal. Proponents should clearly indicate in their submission which parts, if any, are exempt from disclosure under the regulations of MFIPPA.

Any personal information required on the proposal form is received under the authority of the Township of North Stormont. This information will be an integral component of the quote submission. All written proposals received by the Township shall immediately become the property of the Township and will become a public record once a proposal is accepted by the Township of North Stormont and a contract is signed. All information contained in the proposal will be available to the public including personal information.

3.14 Acceptance of Terms and Conditions

Submitting a Proposal indicates acceptance of all the terms and conditions set out in the RFP and any Addenda.

A person authorized to sign on behalf of the Proponent must sign the Proposal.

4.0 Proponent Requirements

4.1 General Considerations

The Township of North Stormont reserves the right to require proponents to produce any of the following:

- i) Financial and corporate information;
- ii) Valid WSIB Clearance Certificate and other certificates and documentation proving health and safety compliance;
- iii) Additional assurances or protections as deemed necessary by the Township of North Stormont.

4.2 Insurance Requirements

The successful proponent shall obtain and maintain in force throughout the duration of the Agreement and for a minimum period of three (3) years after expiration or termination of the Agreement:

- a) Commercial general liability insurance in an amount not less than five million (\$5,000,000.00) inclusive per occurrence. The policy shall add the Corporation of the Township of North Stormont as an additional insured. The coverage provided shall include, at a minimum, the following:
 - i) Premises and operations;
 - ii) Broad form products and completed operations;
 - iii) Bodily injury, including death;
 - iv) Broad form property damage;
 - v) Personal injury;
 - vi) Broad form blanket contractual;
 - vii) Waiver of subrogation in favour of the Township;
 - viii) Non-owned automobile, including contractual;
 - ix) Contingent employers' liability;
 - x) Employees, consultants and sub-contractors as insured;
 - xi) Cross liability; and
 - xii) Severability of interest.
- b) Automobile insurance with respect to owned or leased vehicles used directly or indirectly in the performance of the services covering liability for bodily injury, death and damage to property with a limit of not less than five million (\$5,000,000) inclusive for each and every loss.
- c) Crime insurance in an amount of not less than one million (\$1,000,000.00) per occurrence, such insurance to extend to losses the Corporation of the Township of North Stormont might suffer as a result of fraudulent or dishonest acts of the

Contractor's employees, agents, Approved Subcontractors or Assigned Persons in performing any or all of the Services under this Agreement.

- d) Technology Professional Liability insurance for financial loss arising out of an error, omission or negligent act in the rendering of Services in an amount not less than five million (\$5,000,000.00) per claim and ten million (\$10,000,000.00) aggregate. Such policy shall be on a claims-made basis and shall provide coverage for damages and defense costs. The Technology Professional Liability policy will also include an insuring agreement for cyber or network security and privacy liability insurance, covering financial loss arising out of actual or potential unauthorized access, unauthorized use, and a failure to protect confidential information which results in loss or misappropriation of such information in both electronic and non-electronic format. Such insurance will have a limit of an amount not less than five million (\$5,000,000.00) per claim and ten million (\$10,000,000.00) aggregate. The Contractor shall maintain said liability coverage in place for a three (3)-year time period after termination of the Agreement by way of annual policy renewal, or purchase of extended reporting period.

All the above insurance policies shall contain an endorsement by the Contractor's insurer to provide the Township with ninety (90) days prior written notice of cancellation or material change in risk.

The Contractor shall deliver to the Township prior to the commencement of the Services under this Agreement, certificates of insurance evidencing coverage in Section 4.2. During the term of the Agreement, the Contractor shall provide evidence that all such policies are in full force and effect by way of certificates of insurance:

- Annually; or
- If there are mid-term amendments to coverage which could adversely impact the Township, at the time the change is effected; or
- At any time, at the Township's request.

5.0 Indemnification & Hold Harmless

The Contractor shall defend, indemnify and save harmless the Township of North Stormont, its elected officials, officers, employees and agents from and against any and all claims of any nature, actions, causes of action, losses, expenses, fines, costs (including legal costs), interest or damages of every nature and kind whatsoever, including, but not limited to, bodily injury, sickness, disease or death or to damage to or destruction of tangible property including loss of revenue or incurred expense resulting from disruption of service, arising out of or allegedly attributable to the negligence, acts, errors, omissions, misfeasance, nonfeasance, fraud or willful misconduct of the Contractor, its directors, officers, employees, agents, contractors and subcontractors, or any of them, in connection with or in any way related to the delivery or performance of this contract. This indemnify shall be in addition to and not in lieu of any insurance to be provided by the Contractor in accordance with this contract, and shall survive this Contract.

The Contractor agrees to defend, indemnify and save harmless the Township of North Stormont from and against any and all claims of any nature, actions, causes of action, losses, expenses, fines, costs (including legal costs), interest or damages of every nature and kind whatsoever arising out of or related to the Contractor's status with the Workplace Safety & Insurance Board (WSIB). This indemnity shall be in addition to and not in lieu of any proof of WSIB status, and compliance to be provided by the Contractor in accordance with this Contract, and shall survive this contract.

6.0 Selection Criteria

6.1 Criteria for Evaluation of the Software

The Township will use the following criteria in evaluating the proposal received.

- Ability to meet features – 50% - The ability of the Software to meet the features identified within section 2 of the RFP and showcased during the demonstration process.
- Software support – 10% - Within the proposal process the vendor shall explain how their product will be supported with online forums and tools, as well as knowledgeable people in a timely and easy to reach manner, throughout the agreement or client-vendor relationship.
- Licensing flexibility – 10% - Should the Township wish to expand its use of the software; we give advantage to software in our scoring that can accommodate growth at a low cost. Changes to software licensing should be easy to change.
- Proven industry track record – 15% - References and widespread use and acceptance in the industry.
- How intuitive the software is to use – 15% -The software will be used by both technical and non- technical staff. It should be easy to use, and features of the program should be intuitive. As part of the demonstration process, the Township will also evaluate how easy the software is to use.

6.2 Software Pricing

Pricing will be evaluated as a separate criterion using a forecasted five-year total cost of ownership. Please include in your submission all necessary information to determine this cost, including but not limited to:

- Initial capital cost, set up costs and licencing fees (# of licences included and cost for additional if applicable)
- Reoccurring licencing and/or maintenance fees
- Support/Helpdesk costs
- Implementation and/or consulting fees
- Hosting costs (if applicable)
- If applicable, please break down the costs of different modules. For example, if the Maintenance Management or Long-Term Forecasting are optional components, please provide these separately.

6.3 Determining the Successful Proponent

In determining the successful proponent, the Township will produce an Overall Evaluation Score using a weighted formula comprised of the following:

Evaluation of Software Score + Software Pricing Score = Overall Evaluation Score

The Township of North Stormont reserves the right to cancel this RFP at any time, for any reason, prior to an official contract being signed.

7.0 Contact Information & Inquiries

Questions regarding this proposal must be directed to Carly Wheeler, Treasurer or Moe Hammoud, Asset Management/Jr. Planner. Contact with any other Township officials, other than Carly Wheeler or Moe Hammoud, is not official and should not be relied upon.

Carly Wheeler, Treasurer
The Township of North Stormont
15 Rue Union St., P.O. Box 99
Berwick, ON. K0C 1G0
E: cwheeler@northstormont.ca
P: (613) 984-2821 x228
F: (613) 984-2908

Moe Hammoud, Asset Management/Jr. Planner
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