



**Request for Proposal
(RFP)**

**Website and IT Service Delivery and Modernization Review
RFP Economic Development 20-01**

Electronic Request for Proposals will be received not later than:

**Friday, August 14, 2020
11:00 a.m. Local Time**

Emailed to: bayotte@cavanmonaghan.net

Subject Line: **Economic Development - 20-01 Website and IT Service Delivery and
Modernization Review.**

Attn: Brigid Ayotte, Economic & Community Development Co-ordinator

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1.0 General Background

The Township of Cavan Monaghan (hereinafter the "Township") requires the services of a qualified consultant to undertake a comprehensive service delivery and modernization review of its website and IT services (hereinafter the "Project").

In the Early Spring of 2020, the Township was the recipient of funds (\$25,000) from the Ministry of Municipal Affairs and Housing to conduct a review of the existing operations relating to administration, fleet management, complaint resolution and mapping and identifying opportunities to streamline processes and enable online self serve options on the Township's website.

The Township is a predominantly rural municipality, forming the south west section of Peterborough County. The population of the Township of Cavan Monaghan is approximately 8600 and encompasses a geographic area of approximately 306 square kilometres. It is assumed that the Township will see an average annual growth rate of about 2.2% over the 2016 to 2041 forecast period. Accordingly, the Township's total population would increase to 15,500 by 2041¹.

The Township of Cavan Monaghan is a lower tier municipality located in the County of Peterborough. The Township includes three ward areas; Cavan, Millbrook and North Monaghan. A 5-member Council governs the Township, one representative for each ward, a Deputy Mayor and Mayor.

Under the Information Technology Managed Services Agreement (the Agreement), the County of Peterborough provides a full support IT service that provides IT services 24/7/365. The County is responsible for the safety, security, and reliability of the Client's IT infrastructure and associated services as documented in the agreement. Core technologies in use consist of MS Server and desktop operating systems, MS Active Directory, MS Exchange, MS-SQL Server, hosted VOIP and Apple devices. There are approximately 50 users of the network infrastructure which consists of both wired and wireless technology.

The Agreement is administered by the Finance Department and includes coordinating the provisioning, installation, security, support and maintenance of hardware, software and operating systems for servers, desktop/laptops, mobile devices and associated vendor management and support. In addition, IT provides professional input and recommendations towards project and policy support and development for all corporate systems and services that connect with the township's corporate network.

The Township recently launched (March 2020) a new Corporate website utilizing the iCreate Content Management Program. The website is managed by the Economic

¹ Watson & Associates Economists, *Township of Cavan Monaghan Growth Management Strategy 2020* page 5-3

Development Department through a Hosting Services Agreement with E-Solutions. Services delivered through the iCreate platform include Content Management, Calendar, Form Builder and Business Directory Modules. Agenda and Minutes are managed by the Clerk's Department through a Hosting Services Agreement with E-Scribe Meeting Management Program. E-Scribe contains an application programming interface (API) that enables the integration of the agenda and minute files with the Council Calendar on the ICreate platform.

The Township reserves the right not to accept any proposal and to select individual items specified in the scope of work. The requirements for responses to this Request for Proposal (RFP) are described in this document. The proposal must meet all of the requirements outlined. The Township, at its sole discretion, reserves the right to refuse any proposal and to re-issue this RFP.

All proposals must be submitted electronically to bayotte@cavanmonaghan.net with the subject line: Economic Development - 20-01 Website and IT Service Delivery and Modernization Review.

1.1 Overview of existing systems

There are four key functions within the Township that Council and Staff are looking to better integrate with the desire to see more efficiencies and seamless service delivery. Those four key functions are;

- Administration
- Fleet Management
- Complaint/Issue/Inquiry Tracking and Resolution
- Mapping.

Administration

The Township currently manages the majority of municipal services through Keystone Complete. Keystone includes a suite of financial modules, such as; general ledger, accounts payable, accounts receivable including metered utilities, property taxes, cash receipts, fixed assets and banking. In addition, Keystone provides non-financial administration modules, such as; animal licensing, by-law indexing, cemetery manager, facility scheduler, program registration, lottery licensing, vital statistics and voter notification.

Currently E-Solutions has an online payment module available through the ICreate platform however it was not activated in the recent launch of the new Corporate website. Keystone is not designed for managing payments through ecommerce to process credit cards, track orders or maintain payment information due to a lack of an API (Application Programming Interface). The Township receives online payments for property taxes and utility billing as accepted and processed by Canadian financial institutions (via online, telephone or barcode invoice payments). The Township is expanding online payments by Canadian financial institutions for general billings with an anticipated launch date by mid August 2020. The Township utilizes electronic funds

transfers (EFT's) for payment processing to vendors, who have enrolled in this option. Paymentus Instant Payment Network will permit the processing of online payments for municipal billings with a third-party user fee to residents. Although it provides flexibility for residents/customers to make online payments, Keystone requires billing/invoicing to be created in Accounts Receivable first, which then can be used by the resident/customer to make the online payment through Paymentus. This is a multi-step process for administration and not a seamless electronic transaction.

Fleet Management

The Public Works Department installed GPS/AVL Hardware and Software from Trackmatics in August 2019. The system provides a host of reports that enable staff to increase efficiencies and levels of service. Specifically, Staff are able to respond to resident inquiries about snow removal with a greater level of accuracy as to location and timing of the snow plow truck. In addition, Staff are able to see areas that are receiving too much material and areas that aren't receiving enough. The software also allows staff to determine the utilization of each vehicle, which can assist staff with fleet management and determining when an asset could be replaced. Costs for various weather events can be easily tracked which could support the Township's request for additional funding in a state of emergency. Currently the program is a stand-alone program used solely by the Public Works Department. Some features and/or reports would be beneficial to other departments i.e. Fire Department/Parks and Facilities and perhaps provide opportunity to share valuable information.

Complaint Tracking/Resolution

Complaint/issue/inquiry resolution is an important function of service delivery for all Municipalities. Currently, the Township has a Municipal Complaint Policy for formal written complaints which includes a formal response. The Clerks Department receives the complaint, logs it, forwards to the appropriate Department Head for resolution. A timeline for response/resolution is applied and a copy of the resolution is kept on file. The Township has a "Report an Issue" form on the website which is for more informal matters i.e. the snow plow didn't plow a certain road, or a streetlight is out. There is a pre-formatted list of common issues which are forwarded to the appropriate Department Head for resolution. In this situation, there is a patchwork of "tracking systems" and responses. There is no one system i.e. "ticket system" that receives, investigates and closes complaints, issues and/or inquiries.

Mapping

The Township currently uses the ESRI ARC GIS Public Mapping and Geographic Information System (GIS) for land use planning. The license has been provided by the upper tier County of Peterborough. As noted, the Township is currently utilizing the mapping system only. The ARC GIS program is a very powerful program that combines data and mapping to create intuitive analysis tools that can be employed across multiple Departments in the Township. A full integration has not been explored to date.

2.0 The Project – Scope of Work

The objective of the Project is to review the Township's existing operations relating to administration, fleet management, complaint tracking/resolution and mapping with the goal of identifying opportunities to streamline processes and an enable online self serve options on the Township's website.

Based on the background information and overview of existing systems provided, the Consultant will identify opportunities and programs that would enable the Township to streamline processes and to utilize modules within the recently modernized website to enhance self-serve options for residents. The Consultant will also investigate and report on challenges and opportunities of making certain information/self-serve options available to the public (i.e. tracking of snow plows) specifically whether such programs would reduce seasonal call levels without increasing unnecessary liability.

The Consultant will compile and summarize findings and provide specific actionable recommendations based on the analysis and findings that aim to identify cost savings and improved efficiencies in a Final report to be presented to Council.

3.0 Reference Material

Included but not limited to:

- Information Technology Managed Services Agreement (the Agreement), the County of Peterborough
- Hosted Services Agreement E-Solutions
- Hosted Services Agreement – E-Scribe

4.0 Deliverables – End Project

The Respondent shall provide the following:

- A digital copy (in MS Word and searchable PDF format);
- One electronic copy of the final power-point presentation suitable for public viewing;
- All materials received from the Township of Cavan Monaghan;
- All project-related written notes and presentation materials prepared by the consultant;

5.0 Respondent Information Required in this Request

At a minimum, proposals must:

- Summarize total project costs, including disbursements, an upset limit and clearly indicate a cost quote for any meetings above and beyond the required staff, Council and public meetings with all costs pre-HST with taxes listed separately;

- Provide a description of the firm, including the number of staffs, offices, and locations, length of time in business, etc.;
- Demonstrate the consulting firm's expertise in Service Delivery Review;
- Provide a summary of the firm's relevant recent experience, including a list of projects completed and underway, three (3) references, and contacts for those references;
- Outline the proposed role for each staff member who will be involved in the project, and an indication of the experience of such staff members with similar projects in a similar setting and the time each staff member was assigned to that project;
- include a concise statement of the firm's understanding of the project requirements and a discussion of the unique aspects of the firm and their approach to the project;
- Outline the methodology to be employed in undertaking the study, including a broad description of how the firm shall approach the subject;
- Provide a complete work plan schedule including a labour allocation schedule that depicts the time that each project member shall spend on the various tasks in the project; and
- Describe the resources that will be allocated by the respondent and the resources that will be expected from the Township.
- Harmonized Sales Tax (HST) to be shown separately.

6.0 Insurance and Indemnification

The successful bidder shall, at its own expense, obtain and maintain required insurance until the termination of the contract, and provide the Township with evidence of:

Commercial General Liability

Comprehensive general liability insurance on an occurrence basis for an amount not less than Five Million (\$5,000,000) dollars for any negligent acts or omissions by the bidder relating to its obligations under this Agreement.

Such insurance shall include, but is not limited to Bodily Injury and Property Damage including loss of use; personal injury; contractual liability; premises, property & operations; non-owned automobile liability, broad form property damage, owners and contractors' protective, products and completed operations, employees as additional Insured, occurrence property damage, contingent employers liability, cross liability and severability of interest clauses.

Such insurance shall add the Corporation of the Township of Cavan Monaghan as an additional insured subject to a waiver of subrogation in favour of the Township with respect to the operations of the bidder. This insurance shall be non-contributing with and apply as primary and not as excess of any insurance available to the Township. The successful bidder shall indemnify and hold the Corporation of the Township of

Cavan Monaghan harmless from and against any liability, loss, claims, demands, costs and expenses, including reasonable legal fees, occasioned wholly or in part by any negligence act or omission whether willful or otherwise by the bidder, its agents, officers, employees or other persons for whom the bidder is legally responsible.

Information Technology Professional Liability Insurance

Information Technology Professional liability (errors and omissions) insurance coverage shall be obtained to a limit of not less than Five Million (\$5,000,000) for each claim and in the aggregate. Such policy shall provide coverage for claims arising out of the services provided hereunder by the vendor or its subcontractors. Coverage shall be maintained for a period of two years following the termination of this contract.

The policy shall also include coverage for all costs incurred by the Company to respond to the theft, loss, unauthorized disclosure or access to Company data, all damages resulting from such incidents, including fines and penalties imposed upon the Company and Coverage shall be maintained for the period of time in which the vendor (or its subcontractors) maintains, possesses, stores or has access to Company data, or for a period of two years following the termination of this contract, whichever is greater.

The successful bidder shall at their own expense obtain and maintain insurance as stipulated in the contract for the duration of the contract. The bidder shall provide the Township with a letter from their insurance broker confirming their ability to meet the insurance requirement as set out in the contract and that if they are successful they will provide the Township with a Certificate of Liability Insurance covering public liability and property damage for no less than the minimum amounts within 10 days of notification of acceptance of the contract award. The policy must contain: A “cross liability” clause or endorsement: An endorsement certifying that the Corporation of the Township of Cavan Monaghan and the successful bidder are included as an additional named insured: An endorsement to the effect that the policy or policies will not be altered, cancelled or allowed to lapse without thirty days prior written notice to the Township of Cavan Monaghan.

7.0 Schedule of Events

Item	Date
Request for Proposal issued	July 17, 2020
Proposals submitted (deadline)	August 14, 2020 11:00 a.m.
August 21, 2020	Completion of evaluation, scoring and interviews (if needed)
September 1, 2020	Report to Council to Award RFP
September 2, 2020	Commencement of services
October 23, 2020	Completion of Report
November 16, 2020	Presentation to Council

Each Respondent must submit an electronic proposal no later than

11:00 a.m. Friday, August 14, 2020 to: Brigid Ayotte, Economic & Community Development Co-ordinator email: bayotte@cavanmonaghan.net Subject line: **Economic Development - 20-01 Website and IT Service Delivery and Modernization Review.**

Any Proposals received after the above deadline will be returned unopened to the Respondent.

8.0 Ownership and Delivery of Materials

The successful proponent agrees that all information and material that constitutes any part of this project, acquired or prepared by or for successful proponent pursuant to this contract shall, both during and following the termination of the contract, be the sole property of the Township, including all information and material provided by the Township to the proponent for the purposes of this contract.

Upon the request of the Township, the successful proponent agrees to deliver forthwith to the Township all materials and information specified in the request that is the property of the Township and in the possession or under the control of the successful proponent. No copy or duplicate of any such material or information delivered to the Township shall be retained by the successful proponent and/or supplier team without the prior written approval of the Township. The successful proponent further agrees not to destroy any material or information which is the property of the Township without the Township's prior written approval. This provision survives the expiration or termination of the contract.

9.0 Pre-Submission and Other Information

If any Respondent has questions concerning the request, finds discrepancies or omissions in the solicitation document, or requires clarifications, such matters should be submitted via email to bayotte@cavanmonaghan.net

Lobbying or contact with Township staff, officials or advisers, including Councillors, about this RFP is prohibited and can be considered grounds for disqualification from the process.

The Township reserves the right to request additional data or information after the Proposal date if, in the Township's sole view, such data or information is considered pertinent to aid the review and evaluation process.

The Township reserves the right to supplement, add to, delete from and change this solicitation document. Respondents will be advised by fax or e-mail of any changes that are made.

The Township reserves the right to reject any portion of any Proposal and/or reject all Proposals, to waive any informalities or irregularities in the Proposals, or to re-invite or to re-advertise.

Any amendments and/or questions will be circulated to all registered on the potential bidders list.

10.0 Evaluation Criteria

The following criteria, which are not in any particular order, will be used to determine the ranking of the respondent and proposed system:

Evaluation Criteria	Score
Experience of Project Team - Direct company, principal staff assigned to the project and references for past performance with other municipalities preferably in the Ontario marketplace, in providing similar services within the last three years.	15
Proposed Work plan <ul style="list-style-type: none"> • Quality • Completeness • Unique/innovative approaches 	30
Schedule/Timetable	
<ul style="list-style-type: none"> • Is the schedule realistic 	5
Total	50

Interviews may be conducted if deemed necessary by the Evaluation Committee.

RFP Evaluation Committee

- The committee will evaluate the submissions based only on the established criteria as presented in the original bid documentation.
- A copy of the completed evaluation forms along with Committee recommendation will be kept in the care and control of the Economic & Community Development Co-ordinator to be kept in a confidential file and utilized for dispute resolution if necessary.
- The Economic & Community Development Co-ordinator shall prepare a recommendation to Council.

11.0 General Information for Respondents

Sub-Contracting

The selected respondent, who has been approved by the Council of the Township, shall be considered to be the prime contractor and shall keep the operation totally under their

control and shall not assign, transfer or sub-contract any portion without the written approval of the Township. The consent of the Township for such assignment or sub-contracting shall not relieve the prime contractor from completion of the project in accordance with the terms of the contract. Where a respondent submits a joint proposal or proposes a partnership arrangement, the respondent must assume the lead or prime contractor position. As such, the respondent will have the overall responsibility for completing the project as proposed.

Contract Amendments and Revisions

- I. No amendment or revision to a contract shall be made unless the amendment is in the best interest of the Township and approved by the Township.
- II. No amendment that changes the price of a contract shall be agreed to without a corresponding change order describing the change in requirement or scope of work.
- III. Amendments to a contract are subject to the identification and availability of sufficient funds in appropriate accounts within Township council approved budget including authorized revisions.

Approval

All RFP's are subject [to the Township's Procurement Policy \(Purchasing By-law No. 2020-22\)](#) and any amendments thereto. The decision of the Township shall be final. The successful respondent shall not make any claims for additional costs or expenses due to the delay in, or cancellation of the award of this RFP, due to the approval process.

To view a copy of the Township's Procurement Policy (Purchasing By-law 2020-22) <https://www.cavanmonaghan.net/en/local-government/resources/By-Law-2020-22-Procurement-purchasing-of-Goods-and-Services-April-2020.pdf>

Workplace Safety & Insurance Coverage

The successful bidder shall provide a Certificate of Clearance from the Workplace Safety & Insurance Board within ten (10) calendar days of receiving acceptance notice of the RFP. Failure to provide such proof may result in the cancellation of the contract.

Payment

- a) Payment Terms shall be thirty (30) days net from the date when a hst invoice is received by the Township of Cavan Monaghan.
- b) Payment for all the work specified in the proposal is included in the Contract Price. No separate measurement or payment will be made for individual items. The payment provided shall be deemed to include full compensation for the supply of information and materials.

Project Meetings

The Municipal Office is closed to public access due to the COVID-19 situation. As such all meetings will be held virtually until further notice.

General

The Economic & Community Development Co-ordinator will schedule meetings throughout progress of the project with written notice of each meeting, preside at meetings, record minutes to include significant proceedings and decisions, reproduce and distribute copies of minutes after each meeting to participants and parties affected by meeting decisions.

Pre-project Meeting

- 1) The Consultant shall be prepared to discuss the following subjects, as a minimum:
 - a) Project Schedule
 - b) Consultant's Project Representative
 - c) Progress Payment Procedures
 - d) Project Changes and Clarification Procedures
- 2) Attendees will include:
 - a) Township Representatives
 - b) Consultant's Office / Representatives
 - c) Subcontractors' representatives if applicable
 - d) Others as appropriate

Access to Information

The disclosure of information received relevant to the issue of a bid solicitation or the award of contracts emanating from bid solicitations shall be made by the appropriate offices in accordance with the provisions of the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, as amended.

All records and information pertaining to tenders, proposals and other sealed bids, which reveal a trade secret or scientific, technical, commercial, financial, legal or other human resources information supplied in confidence implicitly or explicitly, shall remain confidential if the disclosure could reasonably be expected to:

- i. Prejudice significantly the competitive position or interfere significantly with the contractual or other negotiations of a person, group of persons, or organizations;
- ii. Result in similar information no longer being supplied to the Township where it is in the public interest that similar information continues to be so supplied;

- iii. Result in undue loss or gain to any person, group, committee or financial institution or agency; or
- iv. Result in information whose disclosure could reasonably be expected to be injurious to the financial interests of the Township.

Response Form – A - Identification of Respondent

Name of Firm:

Address:

City

Province

Post Code:

Tel:

Fax:

Email:

Name of Person signing for Firm:

Position of Person signing for Firm:

Signature:

Person signing must be authorized to sign on behalf of the Company/Individual represented, and to bind the Company/Individual to statements made in response to this contract.

Do not remove any page from this quotation document.
Failure to return all pages with your bid may invalidate your bid.

Response Form – B - Contract

RE: Contract for Website and IT Service Delivery and Modernization Review

The undersigned has examined the scope of the project described herein and is fully informed as to the nature of the work and the conditions related to its performance. I/WE declare that I/WE have carefully examined addenda no.* _____ to no. * _____ and hereby acknowledge the same to be part and parcel of any contract to be let for all work therein described.

I/We hereby propose to furnish all necessary machinery, tools, apparatus and other mean required to do all the work, furnish all materials and to complete the work herein described in strict accordance with the plans, therefore, and in conformity with the requirements of the specifications and supplemented specifications as may be provided by the Owner for the performance of said Work.

This submission constitutes a valid and irrevocable offer which will remain open for acceptance by the Township for no less than sixty (60) days following the closing date.

All amounts are in Canadian funds.

- To be completed by respondent.

Signature

Date

Person signing must be authorized to sign on behalf of the Company/Individual represented, and to bind the Company/Individual to statements made in response to this contract.

Response Form – C - References

References – Must be completed and returned with submission

References: State names, addresses and telephone numbers and email addresses of clients for whom your company has performed similar services:

1. Name: _____
Address: _____

Telephone: _____ Email: _____

2. Name: _____
Address: _____

Telephone: _____ Email: _____

3. Name: _____
Address: _____

Telephone: _____ Email: _____

References will be used as part of the evaluation process

Response Form – D - Fee Proposal

Website and IT Service Delivery and Modernization Review costs within scope described in RFP Economic Development 20-01.

Stage 1: Background and Systems Review		
Estimated number of meetings:		
Cost: \$	HST: \$	Total: \$
Stage 2: Opportunities/Program Options		
Estimated Number of Meetings:		
Cost: \$	HST: \$	Total: \$
Stage 3: Challenges and Opportunities Review		
Estimated Number of Meetings:		
Materials for Presentation:		
Cost: \$	HST: \$	Total: \$
Stage 4: Recommendations		
Estimated Number of Meetings:		
Materials for Presentation:		
Cost: \$	HST: \$	Total: \$
Stages 1-4 Total Cost:		
Cost: \$:	HST: \$	Total: \$

Hourly rate for additional services considered out of scope:

Name of Person Signing

Position of Person Signing

Signature

Person signing must be authorized to sign on behalf of the Company/Individual represented, and to bind the Company/Individual to statements made in response to this contract and must have a full understanding of the responsibilities and work to be completed in Economic Development 20-01, Website and IT Service Delivery and Modernization Review.