

## REQUEST FOR PROPOSAL 2021-02

### Digitization and Efficiency Improvement Review

**RFP Issue Date:**

**RFP Closing Date and Time:** Submissions must be received by 12:00 p.m.  
local time on December 10<sup>th</sup>, 2021

**RFP Closing Location:** 2357 County Road 45  
Norwood, ON  
K0L 2V0

**Contact:** Candice White  
CAO/Clerk/Treasurer  
Township of Asphodel-Norwood  
705-639-5343  
[cwhite@antownship.ca](mailto:cwhite@antownship.ca)

**Notice:** Late submissions will not be accepted

**The Township appreciates all proposal responses, however only shortlisted or successful candidates will be contacted.**

STRIVING TO PURCHASE AND SUPPLY THE PROPER EQUIPMENT, MATERIALS, SUPPLIES AND SERVICES WHEN NEEDED, WITH THE RIGHT QUALITY, THE RIGHT QUANTITY, AT THE RIGHT PRICE, FROM THE RIGHT SOURCE AND AT THE RIGHT TIME IN A MANNER THAT IS FAIR AND EQUITABLE TO ALL.

**REQUEST FOR PROPOSAL 2021-02**

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Submitted By:	
Name of Company/Individual	E-mail Address
Address	Phone Number
Name of Individual Signing for Company	Date

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**GENERAL**

Submissions of Proposals for the **Digitization and Efficiency Improvement Study** will be received in a sealed envelope, clearly marked as to its contents, by the Township of Asphodel-Norwood.

**Proposals will be received at the office of:**

Candice White, CAO/Clerk/Treasurer  
 Corporation of the Township of Asphodel-Norwood  
 2357 County Road 45  
 Box 29, Norwood, Ontario  
 K0L 2V0

No later than Friday, December 10, 2021 at 12:00 pm local time. Hand delivered proposals are to be dropped in the container located outside the Municipal Office entrance clearly marked “RFP #2021-02”.

**RIGHT TO ACCEPT OR REJECT PROPOSALS**

Acceptance or rejection of proposals will be at the sole discretion of the Municipal Council. The Municipality reserves the right to reject the proposal of any bidder who does not furnish satisfactory evidence of sufficient qualification to successfully execute and complete the work in the specified time.

**INQUIRIES DURING PROPOSAL PREPARATION**

Inquiries regarding the interpretation or scope of this Request for Proposal shall be directed to the office of the Township of Asphodel-Norwood in writing, attention: (manager’s name, address and email)

**EVALUATION OF PROPOSAL/CONSULTANT SELECTION**

An evaluation committee will review the submitted proposals and selection will be based upon the following criteria in concurrence:

15%	Completeness of Proposal (Fulfilling all requirements)
25%	Demonstrated experience of Consultant’s project team with respect to similar works undertaken and capabilities of project team members.
25%	Demonstrated approach, understanding and methodology in fulfilling all project requirements and in defining the work plan tasking to be undertaken.
35%	Lowest acceptable price

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Bidders are advised that only complete submissions will be reviewed and evaluated. Bidders are further advised that proposals are to be a maximum of 8 pages (excluding schematics, references, schedules, illustrations and C.V.'s) and that only the first 8 pages inclusive of each submission will be reviewed.

### **CONSULTANTS TO INVESTIGATE**

Consulting firms submitting a proposal shall satisfy themselves by personal examination of the site, review of the available documentation (available for viewing at Municipal office), and by such means as they prefer, as to the actual conditions and requirements of the work.

### **PROJECT INFORMATION**

The Township of Asphodel-Norwood is seeking submissions from qualified consulting firms to provide a **Digitization and Efficiency Improvement Study** in support of the project described below:

## **1. SUMMARY AND BACKGROUND**

The Township of Asphodel-Norwood (the Township) is a lower-tier municipality in the County of Peterborough, established and operated under the Municipal Act, 2001. The Mayor and Council are elected by citizens of the community every four years. The current Council contingent is made up of a Mayor, Deputy Mayor and five councillors. The Township has appointed a number of boards and committees along with various volunteers who work on behalf of the Township at various functions. has a permanent population of 4,109 residents. The Township's geographic area spans across approximately 161 square kilometers. Services provided to the community include typical municipal functions, such as public works, parks and recreation facilities and programming, planning and economic development, fire protection, general government and library services.

## **2. PURPOSE**

As a result of being awarded grant funding by the Province of Ontario for Municipal Modernization Program Intake 2 –Third-Party Review Stream, the Township is seeking proposals from qualified Bidders for a review, research and recommend digital solutions to assist the Township in eliminating inefficiencies and red tape for our residents, stakeholders and development community. The digital approach will include finance, work

order solutions, file management, planning applications/approvals, by-law management and facility scheduling.

The Township's Mission Statement is 'to provide a comprehensive range of municipal services in a sustainable, efficient and cost effective manner. This project supports the Township's key strategic direction of Sustainability: Achieving Operational Excellence and the pursuit of customer service excellence.

### **3. OBJECTIVES**

The objectives of this project are twofold, the first of which is to review current functions in detail to identify opportunities for efficiencies, and to improve and modernize business processes and service delivery. The second objective is to make recommendations for digitization of services. Digitization of services is one way to increase access to services and have a positive impact on the customer experience with the Township while offering opportunities to identify and achieve efficiencies. While always the plan to increase digitization, the COVID-19 pandemic has brought a sense of urgency to governments to modernize the delivery of critical services to residents and provide more options for access.

This service review will focus on service delivery, customer experience and modernization opportunities as well as administrative process review to reduce/eliminate non-value added activities which will ultimately reduce time and cost.

The Township's end goal is to have recommended solutions that will result in services becoming more efficient, modernized service delivery, while respecting legislative requirements and customer service excellence.

Potential benefits include, but not limited to:

- Improved access to Township services
- Elimination of non-value added activities to increase capacity to deliver services and meet increasing demands
- Improved service continuity for areas where in person access is unavailable
- Reduce/eliminate paper based processes
- Achievement of cost savings by shifting client inquiries from higher cost channels to lower cost digital self service

- Efficiencies in business processes and elimination of red tape to become more customer focussed and LEAN.
- A comprehensive Digital Strategy and implementation plan with priorities and costs as well as payback timeframe and long term savings.
- Increased employee and customer satisfaction.

#### **4. SCOPE OF WORK AND KEY DELIVERABLES**

Using proven service delivery and business process improvement methodologies as well as change management strategies, the vendor will work collaboratively with key Township stakeholders to deliver the project's objectives in the following 5 stages and provide the key deliverables as outlined below.

It is expected that the vendor will assign a Project Manager as part of the team who will provide regular status reports on the progress of the project.

##### **STAGE 1: Project Planning and Initiation**

- i. At the Project Kick off meeting, the vendor's Project Manager will establish the foundation for the Township's core project team to ensure mutual understanding of the project objectives, scope, schedule, milestones, roles and responsibilities of required resources, document review requirements and any risks associated with the project.
- ii. This stage will include the creation of the stakeholder register and consultation approach for each area to ensure that the vendor gains sufficient understanding the current state of the Township's services, processes and technology.

##### **Key Deliverables for Stage 1:**

1. Agenda for Kick Off meeting and sample Status Report
2. Engagement plan and communication for all stakeholders
3. Proposed information gathering approach and preliminary document request
4. Updated detailed project plan.

##### **STAGE 2: Documentation and Assessment of Current State Service Delivery Processes**

Upon completion of Stage 1, the Vendor shall undertake the following:

- i. Gain a thorough understanding of the Township's current service delivery processes for the following areas: finance, work order solutions, file management, permitting, inspections, planning applications/approvals and facility scheduling. This will be achieved through consultation, process and system walkthroughs, documentation analysis and data analysis.
- ii. Consult with staff, management and Council to gain their views of possible areas for improvement and digitization opportunities.
- iii. Map each major process using process mapping tools and include the assessment of value added and non-value activities, costs of each service.
- iv. Assess each area for current state of digitization and provide a list of possible benefits of digitization and improvements.

**Key Deliverables for Stage 2:**

1. Current state assessment report of all major service delivery processes including process maps illustrating current digitization, systems utilized and documents.
2. As part of the report, provide the current resources, costs and time dedicated to each process as a baseline for possible efficiencies and savings.
3. Provide a diagram of the current technology infrastructure and integrations.
4. Provide a gap analysis between the current state and service expectations.
5. Include a report that identifies opportunities for digitization of services.

**STAGE 3: Public Engagement**

In order to understand the current customer experience and areas where 'red tape' exists from their perspective, targeted customer engagement should be undertaken.

- i. Develop a survey and consultation approach to gain insights from existing or prospective customers and provide link for Township's website and social media.
- ii. Administer survey and analyze results in order to understand areas where red tape is hindering the customer experience.

**Key Deliverables for Stage 3:**

1. Report of the Customer service experience with summaries of feedback.
2. Customer journey maps that allow to prioritize opportunity areas, uncover pain points and define touchpoints to focus digitization efforts.

**STAGE 4: Development of future state processes and digitization opportunities with multi-year improvement and implementation road map**

- i. Develop future state process maps based upon the recommended process and system changes illustrating the savings in time, costs by eliminating non-value added activities with any investments required for implementation, training and system purchases.
- ii. Gather information to inform the multi-year technology road map including software options currently available as well as requirements for any procurement.
- iii. Identify the recommended phasing in of services to be modernized based upon greatest return on investment and customer service requirements, departmental readiness and system availability.

**Key Deliverables for Stage 4:**

1. Future state process maps illustrating the changes in roles, savings, investments and training required.
2. Recommended change management strategy including communications and training.
3. Assessment report of digitization opportunities and investments.
4. Multi-year technology roadmap of services to digitize and transform, Priority services in the roadmap should focus on those that are customer focussed and greatest return on investment/impact.

**STAGE 5: Reporting and Presentations**

**Reporting will include:**

- i. Development of a draft final report summarizing all information collected including program and public insights with opportunities for improvements to services and digitization.
- ii. Presentation to Senior Management Team to provide opportunities for validation and additions/changes.
- iii. Presentation to Council.
- iv. Develop Final Report for the Township to be submitted to the Province and posted publicly.

**Key Deliverables for Stage 5:**

1. Draft Final Report
2. Presentation to Senior Management Team
3. Presentation to Council

4. Final Report

**5. ANTICIPATED PROJECT COMPLETION TIMELINE**

**All deliverables for this project shall be completed by May 10, 2022.**

**SUBMISSION REQUIREMENTS**

The contents of the proposal submission should include:

- The Proposal & Detailed Work Plan submission shall contain the following information and not exceed 15 pages.
- Detailed overview of the firm's qualifications and experience. The project manager, key staff and sub-consultants must be listed.
- A workplan proposal fully describing the approach to the project is required with main tasks to be undertaken, including project hours. Tables, diagrams, company brochures and resumes may be appended.
- Demonstrated experience with conducting reviews for comparable municipalities, in terms of both population and breadth of services.
- Outline of key project team members, demonstrating relevant experience and roles that will be assumed in the execution of work. Include resumes of all project members as part of the appendix.
- Description of data collection and staff/council engagement approaches.
- Three references and a listing of similar projects of scope and scale, including links.

All submissions are subject to the following conditions:

- Due to COVID-19 proposals will not be opened publicly.
- Late submissions will not be given consideration and will be returned unopened.
- The lowest or any bid will not necessarily be accepted and the Municipality reserves the right to accept or reject any part of or all proposals.
- Award of the Proposal does not, in any manner, guarantee award of any

future related component of the identified work program.

- Award of the Proposal shall be subject to a review by a selection panel and subject to Council approval.
- The submission format is provided to ensure that a minimum level of information is submitted. Bidders shall reply to this RFP in sufficient detail to provide a basis for evaluation. Bidders may be required to provide further information or clarification on the contents of their submissions.
- The Bid sheet shall be located at the last page of the proposal binder.

**ORGANIZATION OF COSTS**

To assist the Municipality in its budgeting and record keeping processes all costs associated with the project shall be documented through detailed invoices of all work and tasks undertaken for the applicable period.

**MEETINGS**

Regular meetings will be held throughout the project at the call of the chair of the Project Manager and Township team lead.

**SCHEDULE**

The Consultant will prepare a schedule for all tasks and activities to be undertaken for all components of the work, including milestone dates, meetings and approved periods.

<b>DESIRED PROJECT SCHEDULE</b>	
<b>Description:</b>	<b>Date:</b>
Phase 1: Project Initiation	January 3, 2022
Phase 2: Current State Assessment	February 7, 2022
Phase 3: Public Engagement	February 28, 2022
Phase 4: Future State and Opportunity Development	April 15, 2022
Phase 5: Reporting	May 10, 2022

**DISBURSEMENTS**

Any disbursements must be detailed in the attached costing form.

### **PAYMENTS**

Payments to the Consultant will be on a monthly basis upon an invoice being submitted by the Consultant to the Municipality.

### **ERRORS AND OMISSIONS**

It is understood and acknowledged that while the R.F.P. includes specific requirements, a complete review and recommendation is required. Minor items not herein specified but obviously required, shall be provided as if specified. Any misinterpretation of requirements within this proposal bid shall not relieve the bidder of the responsibility of providing the services as aforesaid.

### **CONSULTANTS INDEMNIFICATION**

The successful consultant shall indemnify and save harmless the Municipality from and against all losses and all claims, demands, payments, lawsuits, actions, recoveries and judgements of every nature and description made, brought or recovered against the Municipality by reason of any act or omission of the Consultants, their agents or employees, in the execution of their work.

The successful consultant shall be responsible for any and all damages or claims for damages or injuries or accidents done or caused by them, their agents, sub-contractors or employees, resulting from the prosecution of the works, or any of their operations, or caused by reason of the existence of location or condition of the works, or of any materials, plant or machinery used thereon or therein, or neglect or omission on their part, or on the part of any of their agents, sub-contractors or their employees, to do or perform any or all of the several acts of things required to be done by them under and by these conditions and such damages and claims for damages.

### **INSURANCE REQUIREMENTS**

The successful consultant must be a member in good standing with the Professional Engineers of Ontario and will be required to provide the following insurance:

- a) Comprehensive General Liability and Automotive Insurance**  
The General Liability Insurance to an inclusive limit of not less than five million dollars (\$5,000,000) per occurrence for property, damage, bodily injury and personal injury. When requested, the Consultant shall provide

the Client on our form with proof of Comprehensive General Liability and automobile insurance (inclusive limits) for both owned and non-owned vehicles.

- b) Professional Liability Insurance**  
The Insurance Coverage shall be in the amount of two million

(\$5,000,000) per claim and in annual aggregate. When requested, the Consultant shall provide the Client satisfaction proof of Professional Liability Insurance carried by the Consultant and in accordance with APEO Act, 1084 and Regulation therein.

**c) Change in Coverage**

It is understood and agreed that the coverage provided by these policies will not be changed or amended in any way, nor cancelled by the Consultant until sixty (60) days after written notice of such change or cancellations has been personally delivered to the Client.

**NOTE: The Bidder will provide W.S.I.B. Clearance Certificate and \$5 Million Certificate of Insurance naming the Township of Asphodel-Norwood as additionally insured to qualify to bid.**

**CONFLICT OF INTEREST**

The bidder and Municipal staff are to discuss any perceived conflict of interest prior to proposal submission to the Municipality.

**COST SUMMARY SHEET**

DESCRIPTION:	ESTIMATED COST:
Phase 1: Project Initiation	\$
Phase 2: Current State Assessment	\$
Phase 3: Public Engagement	\$
Phase 4: Future State and Opportunity Development	\$
Phase 5: Reporting	\$
Disbursements	\$
<b>TOTAL ESTIMATED COST</b>	<b>\$</b>