



THE MUNICIPALITY OF

LAMBTON SHORES

Financial Services

9577 Port Franks Road

Theford, ON N0M 2N0

T: 519-243-1400 / 1-866-943-1400

www.lambtonshores.ca

THE MUNICIPALITY OF LAMBTON SHORES

**Request for Proposal – 2024-31
Asset Management Plan Update
O. Reg. 588/17 Compliance**



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The Municipality of Lambton Shores

9577 Port Franks Road, Theford ON

Telephone: (519) 243-1400

Email: treasury@lambtonshores.ca

[The Municipality of Lambton Shores](http://www.lambtonshores.ca)

October 11, 2024

SUBMISSIONS shall be received no later than the closing time and date noted below to the attention of Janet Ferguson, Director of Financial Services, and must contain the below information.

Request for Proposal Number	2024-31
Project Name	Asset Management Plan Update O. Reg. 588/17 Compliance
Open for Acceptance	90 days from Proposal Closing Time and Date
Question Period Closing Time and Date	October 18, 2:00:00 p.m., local time
Proposal Closing Time and Date	October 25, 2:00:00 p.m., local time
Tentative Project Council Award Date	December 3, 2024
Tentative Project Start Date	December 4, 2024
Tentative Project DRAFT Plan	March 31, 2025
Project Completion Date	June 1, 2025

INFORMATION TO BIDDERS DOWNLOADING THIS DOCUMENT

Bidders downloading this document from the Municipality of Lambton Shores website must register with the Public Works Department to be added to the Bidders List. Interested Bidders are required to complete the information below and return this form via email to:

sshannon@lambtonshores.ca

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

Bidder Registration Form

Company Name: _____

Address: _____

City/Town: _____

Contact Name: _____

Phone Number: _____

Email Address: _____

Project Name: 2024-31 – Asset Management Plan Update – O. Reg. 588/17
Compliance



1.0 Request for Proposal Details

1.1 Purpose

The Municipality of Lambton Shores (“the Municipality”) is issuing this Request for Proposal (“RFP”) to seek interested Proponents for completion of an update to the Municipality’s Asset Management Plan in addition to compliance with O. Reg. 588/17. The scope of work is further detailed within the RFP document.

With this RFP, the Municipality is seeking Proposal submissions which provide the best financial and overall value to the Municipality.

1.2 Background

On November 4, 1998, the Minister ordered that the Municipalities of the Village of Arkona, Town of Bosanquet, Town of Forest, Village of Grand Bend, and Village of Thedford amalgamate as one effective January 1, 2001. The new Municipality named “Municipality of Lambton Shores” was created and has a current population of approximately 11,800 persons.

The Council of the Municipality is comprised of a Mayor, Deputy Mayor, and seven (7) Councillors representing seven (7) wards. The Council is the legislative and decision-making body of the Corporation.

The Municipality of Lambton Shores is responsible for the provisions of many services including but not limited to: Fire Protection, Road Maintenance and Reconstruction, Snow Removal, Municipal Harbours, Water Distribution, Wastewater Collection and Treatment, Storm Sewers, Planning and Zoning, Cemeteries, Parks, Indoor Recreation, Outdoor Recreation, Community Centres, Library Services, Municipal Beaches, Municipal Parking, and General Admissions.

Lambton Shores’ most recent Asset Management Plan update was in November of 2019. The 2019 update met the O. Reg. 588/17 requirement for identifying the existing levels of service for all assets as well as the creation of a Strategic Asset Management Policy.

1.3 Named Parties

For the purposes of this RFP, the following parties are identified:

Owner:	The Corporation of the Municipality of Lambton Shores
Contact for Enquiries:	Sam Shannon, Infrastructure Manager
Telephone No.:	519-243-1400 ext. 8215
Email:	sshannon@lambtonshores.ca



All inquiries, clarifications, or questions shall be communicated through the above noted Lambton Shores contact email address. Answers shall be addressed through addendum which will be provided to registered bidders and through the Municipality website.

[Proposals and RFPs - Lambton Shores](#)

1.4 Request for Proposal (RFP) Procedure

This RFP was released on October 11, 2024. The process regarding submissions and the RFP opening will be applicable for this RFP. Proponents must adhere strictly to the instructions concerning submissions. The Municipality reserves the right to amend the schedule.

All submissions will be received either via email or in-person via sealed hard copy at the Municipality office (9577 Port Franks Road, Thedford ON) before 2:00:00p.m. Local Time, October 25, 2024, and shall be labelled as follows:

Request for Proposal: No. 2024-31
Asset Management Plan Update – O. Reg. 588/17 Compliance
Attention: Janet Ferguson, Director of Financial Services
Municipality of Lambton Shores
9577 Port Franks Road
Thedford, ON N0M 2N0

- A. The Municipality of Lambton Shores reserves the right to accept or reject any or all submissions. The lowest price will not necessarily be accepted as outlined in the evaluation criteria.
- B. Submissions received later than the time specified will not be accepted or considered. Submissions must be plainly marked to reveal contents and the proponents name and address.
- C. Submissions are to be open for acceptance for a period of 90 days beyond the closing date.
- D. Costs shall be provided in Canadian dollars. Prices shall be quoted only on the attached Form of Proposal and HST is to be shown separately as 13%. Costs submitted shall be all inclusive and submitted as an upset limit.
- E. Submissions will be reviewed for compliance, and the unofficial results will be shared on the Municipality website when available.

All hard copy submissions should include three (3) copies of the completed Proposal.

1.5 Question Period Cut-Off Date

During the RFP period, inquiries may only be in writing via email following the aforementioned directions until October 18, 2024, after which time no further



inquiries will be accepted. All other inquiries may not be considered or acknowledged.

Inquiries received after this date will only be answered if deemed by the Municipality to be fundamental to the integrity of the RFP. The Municipality may also issue an addendum for administrative corrections and clarifications at any time prior to the RFP's closing date.

1.6 Withdrawal of Submission

Proponents will be permitted to withdraw their Submission, unopened, after it has been deposited, if such a request is received by the Municipality of Lambton Shores, in writing through email, prior to the time specified for the opening of Submissions.

1.7 Negotiations

The Municipality of Lambton Shores reserves the right to enter into negotiations with the selected Proponent who is determined to offer services in the best interest of the Municipality of Lambton Shores with the intent to arrive at a mutually satisfactory arrangement.

1.8 Sub-Contracts

Any Proponent intending to sub-contract for equipment, labour, services, or supplies must clearly identify all sub-consultants/sub-Proponents in their submission. The Municipality of Lambton Shores reserves the right to accept or reject any sub-contracts.

1.9 Incurred Costs

The Municipality of Lambton Shores will not be liable nor reimburse any Proponents for costs incurred in the preparation of submissions, site inspections, demonstrations, or any other services that may be requested as part of the evaluation process.

1.10 RFP Award

Proponents may be required to make a presentation to the Municipality. The presentation may assist the Municipality in selecting a proponent and may alter scoring. The award of this RFP will be subject to Councils approval and will be subject to a review and evaluation of submissions. This RFP will not necessarily be awarded to any proponent. Work shall only commence following approval, subsequent Agreement execution, and all necessary documentation submitted to and approved by the Municipality.

1.11 Payment



Payment will be made monthly, after submission of a detailed invoice and associated reporting. Invoices will be accepted for payment following substantiation.

The Municipality has a strictly defined budget for the work defined in this document.

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

1.12 Confidential Information

All information provided by or obtained from the Municipality in any form in connection with this RFP either before or after the issuance of this RFP:

- a) Is the sole property of the Municipality and must be treated as confidential;
- b) Is not to be used for any purpose other than replying to this RFP and the performance of the Contract;
- c) Must not be disclosed without prior written authorization from the Municipality; and
- d) Shall be returned by the Proponent's to the Municipality immediately upon the request of the Municipality.

The Proponent should identify any information in its proposal, or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Municipality. The confidentiality of such information will be maintained by the Municipality, except as otherwise required by law or by order of a court of tribunal. Proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis to advisers retained by the Municipality to advise or assist with the RFP process, including evaluation or proposals. If a proponent has any questions about the collection and use of personal information pursuant to this RFP, questions can be directed to the RFP contact.



2.0 Submission Requirements

2.1 General Requirements

- a) The Municipality is requesting responses from Proponents who are both interested and capable of undertaking the project.
- b) The onus is on the Proponent to show their knowledge, understanding and capacity to conduct the work outlined in this RFP.
- c) All information provided in response to this RFP must contain sufficient detail to support the services being proposed. Incomplete Responses will not be considered.
- d) Proponents shall ensure they have carefully examined the provisions, plans, specifications, and conditions attached to this RFP and has carefully examined the site and location of the work to be done under this contract, and the Proponent understands and accepts the said provisions, plans, specifications and conditions and, for the prices set forth in this RFP, hereby offers to furnish all machinery, tools, apparatus' and other means of construction, furnish all materials, except as otherwise specified in the RFP, and to complete the work in strict accordance with the provisions, plans, specifications, and conditions attached to this RFP.
- e) It is agreed that any quantities noted within this RFP are estimates only and may increase or decrease slightly by the Municipality without alteration of the contract price.
- f) The Proponent, by way of submission of an RFP, promise to commence work on an "as required basis" and to diligently perform the work continuously when requested by the Municipality, upon acceptance of the RFP, without undue delay as specified and completes the work in its entirety in consultation with the Municipality as per the included dates.

If the Proponent fails or neglects to commence or to execute the work diligently, and at a rate of progress that will ensure the entire completion of the work within a reasonable time or fail to observe and perform any of the provisions of this RFP, the Municipality may notify the Proponent to discontinue all work under this RFP. The Municipality may then employ such means necessary to complete the work, and in such a case, the Proponent shall have no claim for further payment in respect of work performed.

2.2 Specific Requirements

- a) RFP submissions for the included scope will be received either via email or by hardcopy in-person until 2:00:00 p.m., local time on October 25, 2024, to:



Lambton Shores Finance Department
9577 Port Franks Road
Thedford, ON N0M 2N0
Attn: Janet Ferguson, Director of Financial Services
treasury@lambtonshores.ca

- b) This RFP in its entirety must form part of the submission packages.
- c) Submissions shall be witnessed and/or sealed if hardcopy. If electronic, they must be electronically signed.
- d) Submissions must be fully legible. Submissions that are incomplete, unbalanced, conditional, or obscure, or which contain erasures or alterations not properly initialed, or irregularities of any kind, may be rejected as informal or void.
- e) The Proponent shall take out and keep in force until the date of acceptance of the entire work by the Municipality of Lambton Shores, a comprehensive policy of public liability and property damage insurance acceptable to the Municipality providing insurance coverage in respect of any one accident to the limit of at least \$5,000,000.00 exclusive of interest and cost against loss or damage resulting from bodily injury to, or death of, one or more persons and loss of or damage to property and such policy shall name the Municipality as an additional insured there under and shall protect the Municipality against all claims for all damage or injury including death to any person or persons and for damage to any property of the Municipality or any other public or private property resulting from or arising out of any act or omissions on the part of the Proponent or any of their employees or agents during the execution of the contract and the Proponent shall forward a certified copy of the policy or certificate to the Municipality before the work commences.
- f) The Proponent shall provide a certificate of coverage from the Workplace Safety and Insurance Board (WSIB) prior to commencement of the work.
- g) The Proponent will be required to supply an Executed Agreement to the satisfaction of the Municipality prior to the work commencing. This Agreement will be prepared by the Municipality, and an example can be found in Appendix A.
- h) The Proponent will be required to submit a list of Sub-Proponents (if any) including Health & Safety Acknowledgements prior to the work commencing.
- i) Financial and corporate information if requested.
- j) Other additional assurances or protections as deemed necessary by the Municipality.

2.4 Evaluation Process



All accepted submissions will be reviewed by the Municipality. Any submissions not accepted will not be evaluated and Proponents will be informed as such.

2.5 Proposal Envelope Cover

Proponents shall ensure they complete the Proposal Submission Cover included in Appendix B and affix it to the cover of the envelope containing their submission(s).



3.0 Submission Information

- 3.1 Responses must be received no later than the specified closing time and date, as per these RFP requirements.
- 3.2 Proponents may edit or withdraw a submitted Response at any time up to the official closing time. Respondents are solely responsible to:
- make any required adjustments to their Response;
 - acknowledge the Addendum/Addenda; and
 - ensure the re-submitted Response is **RECEIVED** no later than the closing time and date.
- 3.3 The Municipality reserves the right to accept or reject any and all responses.
- 3.4 Responses are to remain firm for acceptance for a period of **90** days from the closing time and date.
- 3.5 The acceptance and award of the Response, and any potential subsequent procurement processes, and/or execution of an agreement, contract or purchase order may be subject to approval by Council.
- 3.6 By submitting a response, the Respondent acknowledges and accepts all terms and conditions in this Response solicitation document and all policies and procedures as per the Municipality Procurement and Asset Disposal Policy.
- 3.7 Interested Proponents should submit a Proposal outlining how they can assist with the work that has been requested. The Proposal will include:
- a) Completed Form of Proposal.
 - b) Clear statement of total proposed costs as an upset limit.

It is expected that every Proponent will have general knowledge of the existing field conditions and have reviewed the attached reference documents.



4.0 Terms and Conditions

4.1 Questions/Addenda

- a) All questions, inquiries and clarifications regarding this RFP are to be submitted through email to the aforementioned Municipality contact. Inquiries must not be directed to other employees or Elected Officials. Submitting inquiries outside of this framework may result in your Response being rejected.
- b) The Municipality assumes no responsibility for any verbal (spoken) information from any Municipality staff or from any Consultant firms retained by the Municipality, or from any other person or persons who may have an interest in this Response.
- c) Amendments or changes to this RFP prior to the closing date and time stated herein will only be in the form of written addenda issued by the Municipality and distributed through email to the registered plantakers. It is the Proponents sole responsibility to inform itself of any distributed addenda.

Proponents must acknowledge all addenda as part of their submission. Failure to do so may result in rejection.

- d) The Municipality makes no promise or guarantee that addenda will be delivered by any means to any Respondent. By submitting a Response, the Respondent acknowledges and agrees that addenda shall only be emailed to registered plantakers and it is the sole responsibility of the Respondent to check for said addenda.
- e) Where a request results in a change or a clarification to the RFP, the Municipality will prepare and issue an addendum. No addendum will be issued within the 48 hours prior to closing - not including Saturdays, Sundays and Statutory Holidays observed by the Municipality for regular business hours **with the exception of an addendum postponing the closing or cancelling of this RFP, or a piece of information may be critical to the results of the RFP.**

Respondents that have submitted Responses prior to the date and time cut-off for addenda issuance are solely responsible to monitor their email for further addendum and are therefore also solely responsible for submitting a completely new Response acknowledging any said addenda prior to the closing date and time of the RFP solicitation.

4.2 Cancellation

- a) The Municipality reserves the right, at its absolute sole discretion, to cancel this contract with 30 days written notice, without cause and without penalty.



- b) The Municipality reserves the right, at its absolute sole discretion, to cancel this contract with seven (7) days written notice, with cause and without penalty.

4.3 Rights Reserved by the Municipality

- a) The Municipality reserves the right to modify any and all requirements stated in the RFP at any time prior to the possible awarding of a contract.
- b) The Municipality reserves the right to cancel this RFP at any time, without penalty or cost to the Municipality.
- c) In the event of any disagreement between the Municipality and the Respondent regarding the interpretation of the provisions of the RFP, the Municipality shall make the final determination as to interpretation.

4.4 Verification of Information

The Respondent shall cooperate in the verification of information and is deemed to consent to the Municipality verifying such information.

The Municipality shall have the right to:

- a) Verify any Respondent statement or claim by whatever means the Municipality deems appropriate, including contacting persons in addition to those offered as references.
- b) Access the Respondent's premises where any part of the work is to be carried out to confirm Response information quality of processes and to obtain assurance of viability.

4.5 Professional Responsibility

Only qualified and experienced professionals licensed in the Province of Ontario will be considered. The Successful Proponent shall, in all respects, comply with all statutes, laws, and regulations applicable to the work and to persons employed on or in connection with the work, and pay assessments required or levied by the Workplace Safety and Insurance Board, Revenue Canada, the Employment Insurance and specifically the Ministry of Labour.



5.0 Project Specifications

5.1 Description of Services to be Provided

The Municipality recognizes the importance of asset management plans and the role that they play in long- and short-term decision making as well as the significance of the information to the annual and long-term budgeting process. An asset management plan is a long term, living document that needs to be consistently updated as new information becomes available.

The Municipality is seeking to select a qualified Proponent to assist the Municipality in developing an Asset Management Plan with proposed levels of service, and a lifecycle management and financial strategy. The plan will follow the Building Together: Guide for Municipal Asset Plans and will meet the Ontario Regulation 588/17 under the Infrastructure for Jobs and Prosperity Act, 2015 requirements and deadline of July 1, 2025.

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

- Roadways;
- Water;
- Wastewater;
- Storm infrastructure;
- Bridges and Culverts;
- Equipment;
- Rolling Stock;
- Facilities; and
- Land Improvements.

5.2 Objectives

At the on-set of the project, the Proponent will be required to provide an information session to Council that details existing conditions, information about the proposed project, industry best practices, regulation requirements, etc. A final Council presentation will be required at the end of the project to present the final report and outcome to Council.

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

State of the Local Infrastructure

- Review existing plans and provide any recommendations for improvements.
- Review of current levels of service and recommendations for improvements.
- Ensure the completeness of data for each asset category, including:
 - o The replacement cost of the assets in the category.



- The average age of the assets in the category. Review the useful life within our PSAB 3150 policy as comparable to industry standards.
- Review the asset condition and risk ratings of each asset category. Assess the current risk factors being utilized and compare to industry standards to determine if improvements can be made or what the proposed response to those risks are.
- 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.
- Establish the current performance of each asset category.
- Determine lifecycle activities and costs to maintain current levels of service.
- Determine the impact of growth on current levels of service.
- Develop proposed levels of service with respective lifecycle management and financial strategy, in consultation with the Municipality.
- Determine the impact of growth on the proposed levels of service.
- Prepare an executive summary for the Corporate AMP that can be extracted for publication and/or reporting purposes that includes, but is not limited to, key statistics relating to the replacement costs, condition profiles, infrastructure deficit, recommended annual reinvestment required, and total reinvestment required.

Integration with Existing Software

- The Municipality's asset registry is currently maintained within CityWide's Asset Manager module. It is essential that any proposal recommendation by the Proponent be compatible with the Citywide Software functionality, and that the Proponent assist the Municipality as necessary with input into CityWide.

Financial Strategy and Reporting

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

5.3 Proposal Contents

The proposal must provide the following mandatory information:

General Requirements



The proposal should provide a work schedule outlining the approach/methodology to be used and include a detailed timeline for each major study component. Time is to be scheduled for the in-person Council education session, a final Council presentation, and a public input session(s).

The work is to be completed no later than June 1, 2025.

Include a list of required information to be provided by Municipal staff to complete the project.

Firm Qualifications and Experience

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

References

Provide a list of at least three (3) Municipal clients as references. Include the contact person(s), address, telephone number, and email address.

Fees for Service

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

5.4 **Selection Criteria**

Proposals will be evaluated using the following weighted criteria:

Component	Description	Percentage
Overall Impression	The overall quality and depth of the proposal submission	5%
Qualifications	The Proponents will be evaluated based on the range of its capabilities, the depth/strength of its organization structure and the qualifications of the individual team members	15%
Experience	The Proponents experience will be evaluated based upon its past history of successfully providing similar services. References may be contacted in order to verify satisfactory performance on similar projects	20%



Proposed Approach	The Proponents will be evaluated based upon the proposed approach to the project, including work plan/timelines and deliverables	35%
Professional Fees		25%

The order of the items listed should not be taken as an indication of the relative importance of any particular criteria in the evaluation process.

Scoring will be based on the following scale. This scoring sheet will be utilized to score all subsections noted within this RFP that will form part of the Proponents overall score.

Evaluator Scoring	
0-1	Response was significantly lacking or missing
2-4	Met some expectations but not all
5-6	Met minimum expectations
7-8	Exceeded expectations
9-10	Greatly exceeded expectations



APPENDIX A
Sample Agreement

AGREEMENT

THIS AGREEMENT made as of _____ day of _____, 2024.

BETWEEN:

The Corporation of the Municipality of Lambton Shores

(hereinafter called "the Municipality")

-and-

(hereinafter called "the Proponent")

WHEREAS the Corporation of the Municipality of Lambton Shores is desirous that certain Works should be completed, viz. Request for Proposal 2024-31 – Asset Management Plan Update – O. Reg. 588/17 Compliance and has accepted the Submission by the Proponent for the completion of such Works,

NOW THIS AGREEMENT WITNESSETH AS FOLLOWS:

- 1) In this Agreement, words and expressions shall have the same meaning as are respectively assigned to them in the Conditions of Contract hereinafter referred to.
- 2) The following documents shall be deemed to form and be read and construed as part of this Agreement, viz:
 - a. Form of Agreement
 - b. Addenda
 - c. Standard Specifications
 - d. Form of Proposal
 - e. Supplemental General Conditions of Contract
 - f. General Conditions of Contract
 - g. Information to Bidders
- 3) In consideration of the payments to be made by the Municipality of Lambton Shores to the Proponent, as hereinafter mentioned, the Proponent hereby covenants with the Municipality of Lambton Shores to complete the works in conformity in all aspects with the provisions of the Contract.
- 4) The Municipality of Lambton Shores hereby covenants to pay the Proponent in consideration of the completion of the Works at the Contract Price in the manner prescribed by the Contract. The issuance of the final estimate for payment by the Engineer, and the acceptance by the Proponent of the amount or amounts certified for payment there under, shall constitute a waiver and release by the Proponent of

all claims by the Proponent under this Contract, against the Municipality of Lambton Shores or Engineer or his/her designate.

- 5) This Agreement shall be binding on the heirs, successors and assigns of the parties hereto.

IN WITNESS WHEREOF the parties hereto have hereunto set their hands and seals.

SIGNED, SEALED AND DELIVERED in the presence of

)
) _____

) I/We have the authority to bind the
) corporation
) Per:

)
) _____

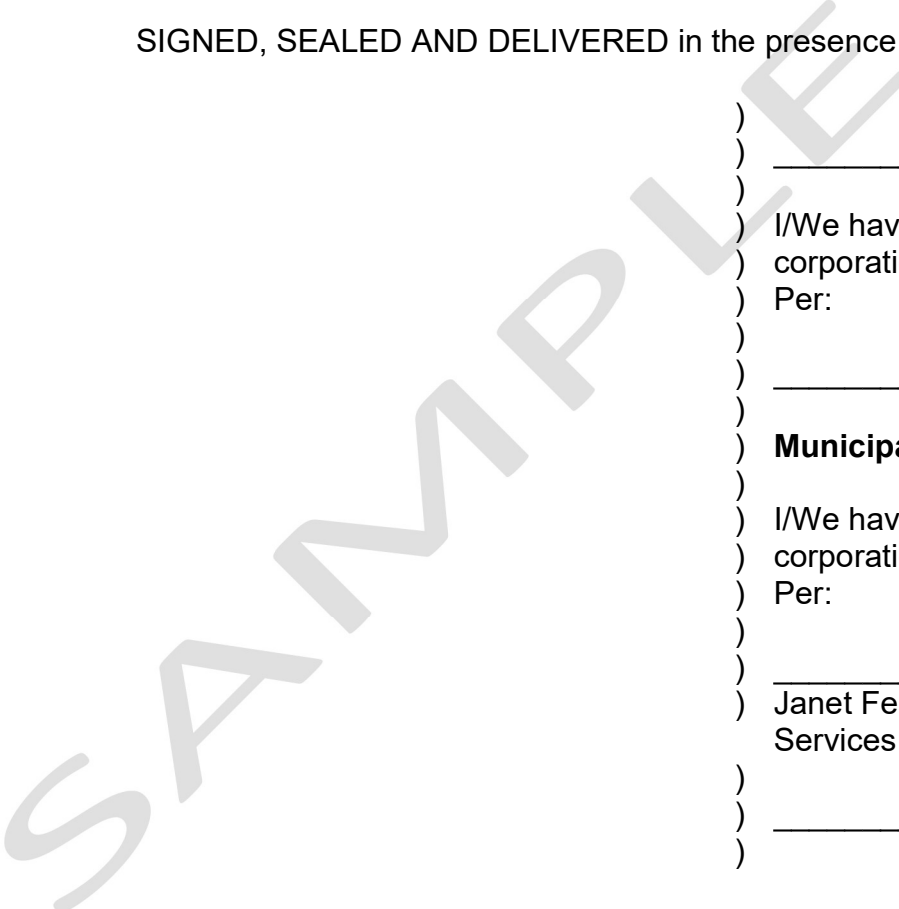
) **Municipality of Lambton Shores**

) I/We have the authority to bind the
) corporation
) Per:

)
) _____

) Janet Ferguson, Director of Financial
) Services

)
) _____
)



APPENDIX B
RFP Envelope Submission Cover



THE MUNICIPALITY OF

LAMBTON SHORES

REQUEST FOR PROPOSAL

CONTRACT NUMBER:

NAME OF RFP:

SUBMITTED BY: