



THE MUNICIPALITY OF  
**LAMBTON SHORES**

**Public Works**  
9577 Port Franks Road  
Thedford, ON N0M 2N0  
T: 519-243-1400 / 1-866-943-1400  
[www.lambtonshores.ca](http://www.lambtonshores.ca)

## **THE MUNICIPALITY OF LAMBTON SHORES**

### **Request for Proposal – 2026-01 2026 Capital Water Meter Replacement Program**



**vibrant - diverse - sustainable**



## **The Municipality of Lambton Shores**

9577 Port Franks Road, Thedford ON

Telephone: (519) 243-1400

Email: [awilliams@lambtonshores.ca](mailto:awilliams@lambtonshores.ca)

The Municipality of Lambton Shores

January 13, 2024

**SUBMISSIONS** shall be received no later than the closing time and date noted below to the attention of Alex Williams, Infrastructure Manager, and must contain the below information.

Request for Proposal Number	2026-01
Contract Administrator	Municipality of Lambton Shores
Project Name	2026 Capital Water Meter Replacement Program
Tentative Start Date	Late Winter 2026
Completion Date	Q4 2026
Open for Acceptance	120 days from Tender Closing Time and Date
Question Period Closing Time and Date	Tuesday, January 30, 2026, 2:00:00 p.m., local time
Proposal Closing Time and Date	Tuesday, February 6, 2026, 2:00:00 p.m., local time
Recommendation of Award to Council	February 24, 2026
Bid Deposit	10% of Total Contract Price (Excl. HST)
Performance Bond	100% of Total Contract Price (Excl. HST)
Labour and Materials Bond	100% of Total Contract Price (Excl. HST)
Warranty Term	Detailed Herein



## **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:

[a.williams@lambtonshores.ca](mailto:a.williams@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: 2026-01 – 2026 Capital Water Meter Replacement Program



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## **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 the supply and installation of new water meters and associated assembly components, in addition to associated public consultation within the Municipality of Lambton Shores. The scope of work is further detailed within this RFP document.

With this RFP, the Municipality is seeking proposals which provide the best financial and operational benefits to the Municipality.

### **1.2 Background**

The Municipality has approximately 7,000 water customers; approximately 25% of the existing meters are approaching or are beyond their useful life. All water meters installed in the Municipality are currently read monthly and billed accordingly.

The project will be conducted over approximately a 1.5-year period that will include replacement of water meters and associated hardware based on Municipality database indication of warranting replacement.

### **1.3 Named Parties**

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

Owner:	<b>The Corporation of the Municipality of Lambton Shores</b>
Contact for Enquiries:	<b>Alex Williams, Infrastructure Manager</b>
Telephone No.:	<b>519-243-1400 ext. 8215</b>
Email:	<b>awilliams@lambtonshores.ca</b>

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.

### **Tenders and RFPs - Lambton Shores**

### **1.4 Request for Proposal (RFP) Procedure**

This RFP was released on January 13, 2026. The process regarding the submission of proposals 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 must be sealed and received by Public Works before 2:00:00p.m. Local Time, February 6<sup>th</sup>, 2026, and be addressed as follows:

Request for Proposal: No. 2026-01  
2026 Capital Water Meter Replacement Program  
Attention: Alex Williams, Infrastructure Manager  
Municipality of Lambton Shores  
9577 Port Franks Road  
Thedford, ON N0M 2N0

- A. Two-envelope process: the technical proposal and cost proposal submission shall be in a two (2) envelope process as described herein. The inclusion of pricing within Envelope 1 may result in rejection.
- B. Proponents must identify the person(s) who are authorized to negotiate on its behalf with the Municipality of Lambton Shores.
- C. Proposals received later than the time specified will not be accepted or considered, regardless of the postal seal date. Submissions must be plainly marked to reveal contents and the proponents name and address.
- D. Proposals are to be open for acceptance for a period of 120 days beyond the closing date.
- E. Cost Proposals shall be provided in Canadian dollars.
- F. Proposals will be reviewed for compliance, and the opening will not be open to the public.

**1.5 Question Period Cut-Off Date**

During the RFP period, inquiries may only be in writing following the aforementioned directions until January 30<sup>th</sup>, 2026 , 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 Bonds**

A "Surety Consent" Form must be completed by the Guarantee Surety Company satisfactory to the Municipality and included in Envelope #1.

The successful Proponent, within ten (10) business days after receipt of notification of the acceptance of their Proposal, to furnish, at their own cost, a Performance Bond in the amount equal to One Hundred Percent (100%) of the Total Cost and a Labour and Material Bond in the amount equal to One Hundred Percent (100%) of the Total Cost. The Bond shall be taken with a Guarantee

Surety Company authorized to carry out business in Canada, satisfactory to the Municipality and shall provide for the faithful performance of the Contract.

**1.7 Proposal Copies**

**Envelope 1 to be sealed closed and clearly labeled “Envelope 1: Technical Proposal”. Proponents should affix the RFP cover page included in Appendix D to the envelope cover.**

- One (1) hardcopy (originals) and one (1) electronic PDF copy (USB).
- Proponents shall ensure the necessary forms are furnished with proper signature.
- Consent of Surety.
- Proposal submission.

**Envelope 2 to be sealed closed and clearly labeled “Envelope 2: Cost Proposal”. Proponents should affix the RFP cover page included in Appendix D to the envelope cover.**

- One (1) hardcopy (originals) and one (1) electronic PDF copy (USB).
- Proponents shall ensure the necessary forms are furnished with proper signature.

In the event of any discrepancy between original and electronic copies, the paper copies shall be taken as authoritative.

**1.8 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.

**1.9 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.

**1.10 Sub-Contracts**

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

**1.11 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.

**1.12 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 is subject to Council's approval and will be subject to a review and evaluation of the proposal submissions. This RFP will not necessarily be awarded to any proponent. Work shall only commence following Council approval and subsequent Agreement execution.

**1.13 Payment**

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



## **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) The Proponent shall attach a bid bond or certified cheque in the amount of 10% of the Total Contract Price (excluding HST) made payable to the Municipality of Lambton Shores. The proceeds of this bid deposit shall, upon acceptance of this RFT, constitute a deposit, which will be retained by the Municipality until final acceptance of the work.

It is agreed that the bid deposit shall be forfeited to the Municipality of Lambton Shores if the Proponent fails to file with the Municipality an executed Form of Agreement for the performance of the work prepared by the Municipality in accordance with this RFT and the provisions attached hereto within 15 days from the date of acceptance of this RFT.

The bid deposit for any unsuccessful Proponent will be returned within 10 days of the formal project award.

**Submissions not accompanied by a bid deposit will not be considered.**

- f) 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.
- g) 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 by Quarter Four (Q4) of 2026, or sooner.

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.

All vehicles and equipment are to be in safe and effective operating condition, and properly licensed carriers/drivers must make all deliveries. All loads must be legal within the gross weight and axle weight laws of the Province of Ontario, and tickets must be provided to the Municipality for their records.

Work hours shall be 8:00:00 a.m. to 8:00:00 p.m. Monday to Friday and 9:00:00 a.m. to 5:00:00 p.m. on Saturday, or at the discretion of the Municipality.

The Proponent's customer service team shall be able to respond to appointment or other inquiries in a timely manner. At a minimum, the customer service team be available 8:00:00 a.m. to 6:00:00 p.m. Monday to Friday to provide a "live" response.

## **2.2 Specific Requirements**

a) RFP submissions for the aforementioned scope will be received until 2:00:00 p.m., local time on February 6, 2026, to:

Lambton Shores Public Works Department  
9577 Port Franks Road  
Thedford, ON N0M 2N0  
Attn: Alex Williams, Infrastructure Manager

b) Submissions shall be enclosed in sealed and marked envelopes and include the information noted at the front of this RFP. This RFP in its entirety must form part of the submission packages.

c) Submissions shall be witnessed and/or sealed.

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 is required to supply a detailed schedule as part of Envelope #1 detailing their proposed schedule.
- h) The Proponent will be required to provide bonds as per the aforementioned details prior to commencing construction.
- i) The Proponent will be required to supply an Executed Agreement to the satisfaction of the Municipality prior to the work commencing.
- j) The Proponent will be required to submit a list of subcontractors (including Health & Safety Acknowledgements) and a list of materials suppliers prior to the work commencing.

### **2.3 Instructions**

Technical and cost proposals should be organized generally in the following manner to help facilitate evaluation.

Evaluation of each proposal will be based on content provided within the body of the proposal itself and any supporting addenda provided. Solely providing product brochures and/or websites will not be considered an appropriate response.

The submitted proposals shall not exceed 30 pages, excluding appendices, cover page, tab pages, and table of contents.

#### **Section 1: Introduction**

Proponents must provide a brief profile of the company, list the length of time in business, and the principals involved in the submission including any distributors. If any sub-contractors are included, similar information should be provided.

Provide a primary contact including name, title, address, phone number, email, and any other details the Proponent may deem valuable.

The Proponent must identify those persons who are authorized to negotiate on their behalf with the Municipality of Lambton Shores.

Proponents shall disclose any sub-contractors that they propose to employ in this contract. Sub-contractors may not be changed after award of the Contract without written permissions from the Municipality.

Proponents are required to state any perceived or actual conflicts of interest that they might have with the Municipality or their staff.

### **Section 2: Solution Overview**

Proponents must provide a brief overview of their proposed solution outlining the companies involved and a high-level description of each company's responsibilities on the project.

Proponents must also provide a brief summary of the main advantages of the proposed solution. Articulating how the goals and objectives set forth in this RFP will be met will be highly valued.

### **Section 3: Project Overview**

#### **Project Management**

Proponents shall provide an organizational chart for the Project that details the personnel who are being assigned to the project and highlight the company each project team member is employed with, including what percentage of that individual's time will be directly allocated to this Project.

The proposals should include brief descriptions of the Project Manager and key project team members stating their key responsibilities.

Curriculum vitae of all proposed team members must be included in the appendices, including applicable ongoing and completed reference projects.

#### **Completion**

Provide a list of a minimum three (3) projects and show the completion rate of each project. Details about each project should be provided such that the Municipality can understand how it relates to the program proposed as part of this RFP.

Describe what the Proponent proposes to ensure full completion of this program.

### **Project Plan**

Proponents shall include a project plan (prepared using Microsoft Project) that details all major critical path tasks and their proposed schedule assuming a Council award date of February 24, 2026. The plan should clearly delineate Proponent and Municipality responsibilities.

### **Section 4: Water Meter Specifications**

#### **Water Meter Purchasing Experience**

Proponents should detail their experience and ability to order the required water meter and associated parts based on previous experience. This should include context on the proposed approach of parts purchasing so as to ensure parts are always on-hand and there are no delays from not having the materials required.

#### **Product Warranty**

The Proponent shall detail all applicable warranties for the meter and all other associated parts as to what the warranty covers, what the terms are, what any return processes look like, etc.

#### **Product Training and Support**

The Proponent shall detail the distributors for the products that are being proposed to be employed, where they are located, and any other information that may be deemed valuable.

The Proponent shall detail what support will be provided to the Municipality for warranty, problem investigating, etc.

The Proponent should detail expected level of service and product lead times, and detail how the Proponent will ensure that the program is completed on-time.

The Proponent shall detail all proposed training that will be provided to the Municipality.

### **Section 5: Installation Services**

#### **Project/Installation Experience**

The Proponent shall provide a list of installation projects in the last five (5) years where the proposed approach has been successfully employed, including details of water meters used, quantity, manufacturer, and distributor, etc.

### **Field Personnel**

The Proponent should describe their hiring, training, and certification processes and programs as required for properly maintaining a project team for this project. The Proponent should also provide the total number of supervisory staff, administrative personnel, and number of installers that will be dedicated to this project.

If any sub-contractors are involved on the Proponents team, details on positions should be detailed.

While it's understood that staffing changes are often out of Proponent's control, a plan to ensure the project is always properly staffed should be in-place and detailed.

### **Work Requirements**

The Proponent should fully detail all of their proposed methodologies that will be utilized to successfully implement this project.

An overview of the installation/replacement procedures that will be followed should be detailed.

Problem and conflict resolution procedures should be fully detailed that may come up within this project.

### **Data Management**

The Proponent should detail the systems they already have in-place or will develop and put in-place to support the data management portion of this program, including what information is planned to be collected, frequency, etc.

The Proponent should detail what handheld digital technology they are proposing be utilized for this program.

The Proponent should detail how data integrity will be maintained throughout the program. It should also be explained what IT resources are available to support any issues that may arise.

Proponent's will be granted access to the Municipality CityWide system where all formal information and process will need to be saved and kept, done by the Proponent.

### **Customer Service**

The Proponent shall detail all features related to the proposed call centre operations that will be utilized to support the project, including proposed hours of

operation, technology to be used, etc.

The Proponent should also detail their proposed appointment booking process and methodologies including how customer contact and tracking will be completed.

The Proponent should detail their proposed approach to customer service issues/problems and how they propose to address them.

### **Public Outreach**

The Proponent should fully detail their proposed communication plan, documents to be produced, samples of previously provided similar materials, and experience in developing and executing a public outreach program for this type of project.

### **Quality Control**

The Proponent should detail their quality assurance plan that they are proposing to employ on this program to ensure works are being done as per industry standard and this RFP, at a minimum, and how they plan to take corrective measures to fix any issues that may arise.

### **Section 8: References**

It is anticipated that the Municipality should be contacting references. It is the responsibility of the Proponent to ensure that the references provided are aware and available to answer questions during this period.

Proponents are encouraged to provide more references than the minimum so the team has additional opportunities to evaluate references should some be unavailable or non-responsive.

Proponents must provide a minimum of two (2) references (water utilities) where the program and technology was of similar size and scope.

### **Section 9: Value Added Solutions**

The Municipality encourages Proponents to propose innovative solutions to complete all aspects of the project. Proponents may provide other value-added items at their discretion.

### **Section 10: Compliance and Alternatives**

The Proponent must confirm compliance with the outlined specifications contained herein or in any addendum. Where exceptions to the specifications are proposed, the Proponent must clearly state in this section what exceptions or changes are being proposed, the reason for the exception, and the alternative solution(s) being proposed.



**2.4 Evaluation Process**

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

The Municipality will take the following steps when evaluating the proposals but may deviate from this process where they deem it is in their best interest to do so.

- i. The Municipality will review the submitted Technical Proposals.
- ii. If a Proponent passes the minimum Technical Score requirement of 70% (49/70), a presentation may be requested to discuss any questions or clarifications required before finalizing technical scores.
- iii. For Proponents who's finalized technical scores meet the threshold, the Cost Proposals will be reviewed and form input on the Proponents total overall weighted score which will ultimately recommend award to a Proponent with the solution of the score that provides best value to the Municipality.

**2.5 Evaluation Criteria**

Each proposal will be evaluated on the basis of its technical and financial merits. All proposals will be reviewed to determine if they are responsive based on the specifications. The Municipality requires an innovative and cost-effective solution and will judge each proposal using the evaluation criteria detailed herein.

The technical and cost proposal submissions shall be in a two-envelope process.

Envelope 1 to be sealed closed and clearly labelled "Envelope 1: Technical Proposal". This envelope is to include all information detailed herein.

Envelope 2 to be sealed closed and clearly labelled "Envelope 2: Cost Proposal". This envelope is to include all information detailed herein.

Proposals will be evaluated based on the categories and weighting detailed below.

<b>Technical Proposal</b>	
Letter of Introduction	
Solution Overview	7
Project Overview	13
Water Meter Details	20
Installation Services	20
References	5
Value Added	5
<b>Sub-Total</b>	<b>70</b>
<b>Cost Proposal</b>	
Cost and Fees	30
<b>Total</b>	<b>100</b>

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.

<b>Evaluator Scoring</b>	
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

## **2.6 Tender Envelope Cover**

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

### **3.0 Submission Information**

- 3.1 Responses must be received in hard copy no later than the specified closing time and date, as per the above 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 **120** 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.



#### **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 Contract Execution**

When submissions have been checked, the Municipality will review the Proposals in order to recommend Award.

A Purchase Order shall be issued for execution of an Agreement. The RFP and RFP submission submitted becomes part of the Purchase Order and may be subject to Council approval.

The Form of Agreement for execution will follow the Form of Agreement detailed in Appendix A which may be subject to change.



## **5.0 Project Specifications**

For the purposes of this assignment and parts to be replaced and/or installed, the water meter assembly and associated components consists of the following parts, with direction of flow from left to right aligning with component numbers in an ascending order:

1. Isolation Valve (attached to the waterline from street).
2. Water Meter Frost Plate (sacrificial black steel, under meter, will break if frozen).
3. Water Meter Base.
4. Water Meter Encoder Register Head.
5. Dual Check Backflow Preventer (DuC).
6. Pressure Reducing Valve (PRV).
7. Pressure Reducing Valve Lock Nut (hexagonal nut).
8. Pressure Reducing Valve Operating Bolt (threaded bolt with hexagon head).
9. Isolation Valve (connects to structure plumbing). Shall be threaded IPS ball valve.
10. Drain Port (for winterizing plumbing – not included in a pit meter assembly).
11. Not Picture In This Image – AMR/AMI Remote Meter Reader (wall mounted if not a combined meter).

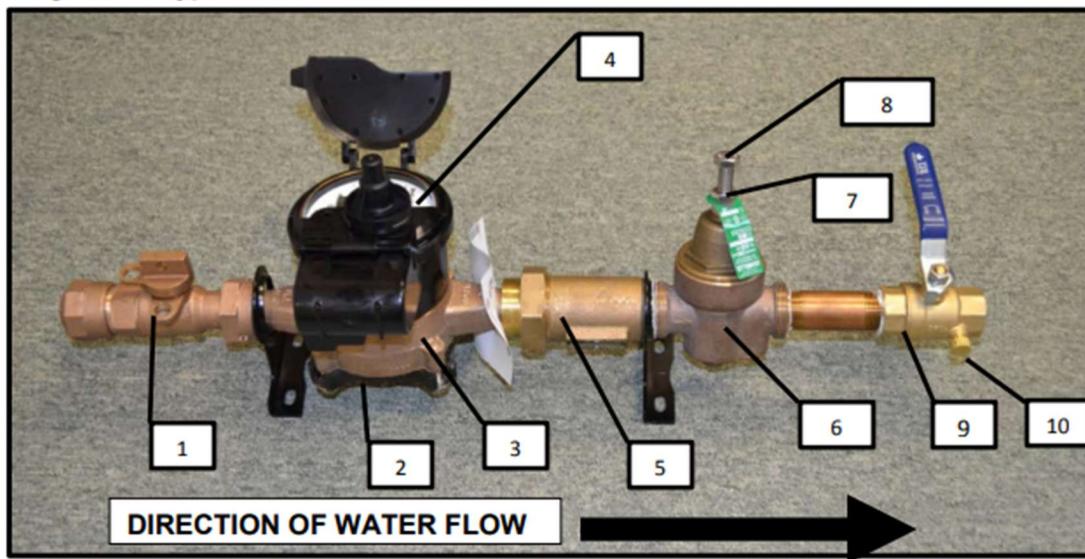
The Proponent shall include the replacement of all parts beyond the isolation valve. For clarity, the Proponent shall remove and replace parts identified as 2-10 on the below diagram and part 11 (not pictured). The construction of the water meter assembly shall match the assembly shown below, with no additional parts being inserted. The Municipality requires the below assembly to ensure consistency across water meter installations.

All parts utilized for the assembly shall be new. The reuse of on-site parts within the new assembly is prohibited. The Municipality reserves the right to reject any water meter assembly that utilizes existing / previously used parts.

As the Municipality has a fair amount of seasonal residence and/or cottages that may have water to the property turned off and on multiple times within a year, or due to proximity to entities that put out large amounts of pressure, the assembly includes components that ideally protects both Municipal and private systems.

The following is a visual diagram of a typical assembly that may vary but is usually generic throughout the Municipality for any updated assemblies.

Diagram of Typical Meter Installation



The proposed assignment generally covers the following areas and communities:

- Port Franks – 63 Meters
- Ipperwash – 232 Meters
- Thedford – 246 Meters
- Grand Bend – 45 Meters
- Southwest of Grand Bend – 294 Meters
- West Bosanquet – 108 Meters

These areas are visually highlighted in Appendix C.

This area includes a total of 988 projected meter replacements ranging in size from  $\frac{3}{4}$ " (19mm) to 4" (102mm) with estimated breakdown as follows:

- $\frac{3}{4}$ " (19mm) – 962
- 1" (25mm) – 15
- 1  $\frac{1}{2}$ " (38mm) – 6
- 2" (50mm) – 3
- 4" (102mm) – 2

The more common 5/8" x  $\frac{3}{4}$ " (15mmX19mm) size is what is to be utilized for the  $\frac{3}{4}$ " referenced meters.

If a 4" size is not available, Proponents may assume a larger meter can be utilized noting all associated works would need to be included for connection to the existing plumbing system that currently operates on a 4" meter.

All registers are to be priced as pit capable submersible registers.



**5.1 Project Manager**

The Proponent will assign a dedicated Project Manager (PM) to oversee all aspects of this project. The PM will have the authority to make decisions on behalf of the Proponent. The PM will be the main point of contact for the Municipality. The PM will be available, as required, in-person to attend meetings with the Municipality or their customers. The PM will respond to all phone or email communication within 24 hours. Where an issue is deemed an emergency, the PM is expected to respond to phone calls or emails within an hour.

While the PM is unavailable (vacation or sick time) a suitable and competent backup will be assigned to fill the position. The Municipality will require a curriculum vitae submission of the replacement PM for approval.

**5.2 Personnel Changes**

The Municipality shall approve all field and management personnel that are working under this contract. Where personnel changes are required, the Proponent shall submit the curriculum vitae of the proposed replacement personnel to the Municipality for review and approval a minimum of four (4) weeks prior to the change. Included with the curriculum vitae shall be all tickets, training records, and/or certifications associated with the work (examples include: working at heights, confined spaces training, etc). It is expected that the Proponent will replace personnel with candidates who have similar experience and expertise in accordance with the Work. The Municipality reserves the right to remove any personnel at its discretion. The Proponent will bear all costs associated with the removal and replacement of the Proponent's personnel.

**5.3 Project Office, Warehouse, and Meetings**

Proponents are responsible for establishing and costs associated with a local office and warehouse for all project activities (if one is not already available). Local presence during this program is mandatory. Proponents may, at the Municipality's sole discretion, utilize a small portion of the Public Works storage building for the purposes of storing materials related to the project. This space is not guaranteed, and the Municipality reserves the right to request the Proponent remove their materials should the space be required.

Prior to the Commencement of the program, the Proponent and all subcontractors shall attend a mandatory Water Meter Assembly Workshop hosted by the Municipality and their Water Operations team Jacobs at the Northville Public Works shop located at 9577 Port Franks Road, Thedford. The purpose of the workshop is to ensure that all Proponent and Subcontracted staff are aware of the requirements of the Municipality and can construct the Water Meter Assembly to match the diagram shown. Attendees will be required to assemble a water meter pre-assembly during this meeting (parts for the assembly shall be provided by the Municipality). This meeting will additionally act

as an opportunity for all parties to provide feedback on and ask questions about assembly procedures.

Upon completion of the Workshop the Municipality shall issue a certified attendance list to all parties. Only staff whose names appear on the certified attendance list shall be permitted to construct and install water meter assemblies under this Program. Should personnel be changed during the course of the program the Proponent shall organize additional Water Meter Assembly Workshops with the Municipality as required. The cost of the additional Workshops shall be borne by the Proponent. The Municipality reserves the right to reject any water meter assembly constructed or installed by uncertified personnel.

In cooperation with the Municipality, the Proponent will develop and distribute meeting agendas at least two (2) business days in advance of a meeting. The agenda will include the name of the meeting, date and time, location, requested attendees, topics to be discussed, and follow up actions from the previous meeting(s).

Proponents will record and distribute minutes of each meeting no more than five (5) business days after the meeting. The meeting minutes will address the agenda items, include the details of the topics discussed, record the agreed to actions with assignments, and expected completion dates.

Where a conference number or internet meeting is required, the Proponent will supply as required with the respective agenda.

Project team meetings expected as part of this project, at a minimum, are as follows:

- Startup meeting.
- Bi-weekly progress meetings.
- Other meetings as requested or required.

#### **5.4 Work Orders**

For each individual meter to be replaced, a work order will be created and tracked using the Municipality's CityWide online software that defines a unique number which represents requested work, at a specific location, for the specific scope.

Each individual work order will track various states of the work, track who the work order is assigned to or waiting on for specific tasks or approvals, and track various customer status' that may include public outreach status, conversations had with the respective homeowner, refusal of work, pictures, etc.

The Proponent, in addition to CityWide, must also track all this information locally on Microsoft Excel or a similar format as backup.

**5.5 Project Communications**

The Proponent should be prepared to fully lead and participate in all communications related to this Work until project completion and is further detailed within this RFP.

**5.6 Water Meter Specifications**

**5.6.1 Mandatory Standards**

Water meters and associated components shall meet or exceed the following applicable ANSI/AWWA standards, at a minimum, as a requirement of this RFP:

- C700-15 Cold-Water Meters – Displacement Type Metal Alloy Main Case.
- C701-15 Cold-Water Meters – Turbine Type, for Customer Service
- C702-15 Cold-Water Meters – Compound Type
- C707-10 (R16) Encoder-Type Cold-Water Meters
- C715-18 Cold-Water Meters – Electromagnetic and Ultrasonic Type, for Revenue Applications
- C710-15 Cold-Water Meters – Displacement Type, Plastic Main Case

**5.6.2 Meter Type**

All positive displacement meters shall utilize an oscillating piston or nutating disk to measure the flow of water passing through the meter. The meters shall have integral strainers.

**5.6.3 Water Meter Main Case**

The water meter main case shall be constructed with materials that comply with NSF/ANSI 372 and NSF/ANSI 61 Annex G specifications.

The water meter main case shall be stamped with the meter size, meter type, direction of flow, and “NSF” on the exterior of the body. The serial number shall be stamped on the main case of the meter.

**5.6.4 Water Meter Size and Length**

The water meter size, capacity, and lengths shall conform to AWWA standards (latest revision).

**5.6.5 Frost Plate and Bolts**

All positive displacement meters, 15mm to 25mm, shall have a composite plastic material frost plate. Cast iron frost plates for sizes 19mm and above are

permitted. The frost plate will provide protection for the meter main case and the meter chamber in the event of the meter freezing. The frost plate shall be connected to the meter body with corrosion resistant stainless-steel bolts and shall be sacrificial black steel.

#### **5.6.6 Enhanced Water Meter Features**

Where available, the water meter may provide enhanced meter functionality relating to temperature and pressure readings, empty pipe alarms or remote shut off capabilities, and the Proponent should ensure to highlight this.

### **5.7 Water Meter Encoder Specifications**

#### **5.7.1 Encoder Register**

The Proponent shall supply an encoder water meter register that records consumption in cubic meters. Acceptable meter reading encoder protocols include Neptune and Sensus. The current technology the Municipality uses is Neptune E-CODER) R900i ARB, which is preferential. The E-CODER) R900i ARB combines the meter and AMR/AMI technology into one meter where an integrated meter is useable. Where an integrated meter is not useable, the current technology the Municipality uses is Neptune T-10 Meters c/w R900 System Endpoints.

The register shall be capable of encoding the meter reading, the register head ID, and any other data provided from the manufacturer's features that are unique to their products. The register ID number shall be the same as the new water meter serial number. Where a dual register meter is being supplied, the meter serial number plus a high low indicator will differentiate the high and low side registers.

Proponents are required to supply and install all meter and configuration components, and the Municipality will not be procuring anything outside of this project.

#### **5.7.2 Reading Resolution**

The meter register head shall display a minimum of eight (8) digits (high resolution). The register shall be shipped factory programmed encoding all digits, a minimum of eight (8) digits.

#### **5.7.3 Programmable Encoder**

The meter encoder should be programmable so that Municipality personnel may alter the meter reading configuration. This includes, but is not limited to, the number of encoded digits in the reading.

**5.7.4 Tamper Protection**

The register head shall be attached to the meter body by a method that will prevent or discourage customers from tampering with the meter and register head. The register head terminal screw cap shall allow for the sealing of the terminal screws.

**5.7.5 Labelling**

The register head shall have permanently stamped on the face of the encoder the manufacturer, the meter size, the meter type, register type, and unit of measure.

**5.7.6 Leak Indicator**

The register head shall have a low flow indicator visible on the face of the meter that can be used by the customer to assist in the detection of a leak within the property.

**5.7.7 Submersible**

All supplied water meter registers are to be capable of being fully submerged in water for the duration of their life.

**5.8 Water Pressure Reducing Valve**

The water pressure reducing valve shall be a lead-free series LFX65B style, or approved equivalent, properly sized based on the overall meter assembly requirements. The lock nut and operating bolt are to both be hexagonal and threaded.

The proponent will be required to explain the use and operation of the water pressure reducing valve to the customer upon completion of the installation.

**5.9 Warranty**

The Proponent shall provide the Municipality with a water meter and register head warranty (for both horizontal and vertical installations). The Proponent shall provide the details of the warranty and the process for returning products during and after the completion of the contract. Product warranties shall apply starting from the date that each water meter and register is installed and in operation.

**5.9.1 Water Meter Manufacturing Defects**

The Proponent will ensure that water meters, register heads, and all other appurtenances are free from manufacturing defects, imperfections, and design deficiencies that may affect their operation, appearance, or serviceability. In all

particulars not covered by this specification and or RFP document, manufacturing quality should be in accordance with best commercial practice. Materials not defined here shall be of the best commercial quality, suitable for their intended purposes and subject to the approval of the Municipality.

For all defective products supplied and installed under this contract, the Proponent is responsible for any and all field investigations and resolutions required during the warranty period. If anything falls outside the warranty period but is deemed to be fully and completely the responsibility of the Proponent, the Proponent will still be held accountable for any remediation required.

#### **5.9.2 Water Meter Warranty**

The main case shall have a manufacturer warranty of a minimum of 25 years.

Perform to AWWA new meter accuracy standards, as a minimum, for a period of one (1) year after being placed into service.

Perform to AWWA repaired meter accuracy standards, as a minimum, for the following time periods, under normal operating conditions:

- 16mm and 16x20mm – Ten (10) years from the date of purchase or the registration of 5,700 cubic metres, whichever occurs first.
- 20mm – Ten (10) years from the date of purchase or the registration of 8,500 cubic metres, whichever occurs first.
- 25mm – Ten (10) years from the date of purchase or the registration of 11,500 cubic metres, whichever occurs first.
- 37mm – One (1) year from the date of purchase or the registration of 3,000 cubic metres, whichever occurs first.
- 50mm – One (1) year from the date of purchase or the registration of 5,000 cubic metres, whichever occurs first.
- 64mm – One (1) year from the date of purchase or the registration of 7,000 cubic metres, whichever occurs first.

Where the water meter and associated appurtenances requires a batter to operate, the warranty should include at a minimum full replacement from year one (1) to 10 and prorated warranty from 11 to 20.

#### **5.9.3 Encoder Warranty**

The encoder meter register shall be guaranteed against defects in material and workmanship. Warranted for a minimum of 10 years from the date of installation. Where the register requires a battery to operate, the warranty shall include full replacement from year one (1) to 10 and a prorated warranty from 11 to 20.



**5.9.4 Other Materials**

All other materials supplied that are not detailed in this section shall have a warranty of one (1) year from the date of installation and operation.

**5.9.5 Supply and Installation Warranty**

The Proponent is responsible for investigating the problem (e.g. leaking meter, noisy meter, etc.) and providing resolution acceptable to the Municipality for a period of one (1) year from the date of installation. The date of the start of the warranty of all products installed by the Contractor will be the date of installation.

Products supplied and installed by the Proponent include all in-and-out costs associated with defective products for the warranty period. Any products damaged as a result of the installation are the responsibility of the Proponent during the warranty period.

The Proponent shall investigate all reading issues with the water meter register and are responsible for all costs associated with this.

**5.10 Product Support and Training**

**5.10.1 Support Requirements**

The Proponent will have a distribution network able to provide a high level of post project support to the Municipality. This will include, but is not limited to, ordering support, product expertise, emergency supply, product training, warranty returns, on-time product shipment, on-site problem investigation (where required), and teleconference and on-site meeting attendance.

**5.10.2 Product Distribution and Supply**

The Proponent shall have an established distribution center that holds an adequate inventory of water meters and their associated parts to service the Municipality's needs. The Municipality requires an adequate supply of water meters in case of emergencies.

**5.10.3 Product Representative**

The Municipality requires the Proponent to provide a high level of customer service. The Proponent will assign a single product representative who will be the main point of contact for all product and order-related questions. This person shall be very knowledgeable about the products being delivered. This Product Representative will be available during normal business hours (8:00am to 4:00pm Eastern time). Calls or e-mails from the Municipality representative should be returned within 24-hours from receipt. The Proponent shall assign a backup person when their primary representative is not available.



**5.10.4 Product Delivery**

All products will be received within six (6) weeks of receipt of directions from the Municipality to order. Where a particular product requires a longer lead time, the Proponent should clearly indicate the proposed lead time for the products.

**5.10.5 Partial Shipment**

The Proponent will deliver all products and quantities detailed in order. No partial shipments will be allowed without prior written consent from the Municipality. Any partial shipment received without prior approval will be returned to the Proponent at their cost.

**5.10.6 Acceptance of Materials**

The Proponent is responsible for all materials and products until the Municipality accepts the products. An inspection will be completed after which the Municipality may deem a product defective and/or accurate. All costs associated with replacement will be borne by the Proponent.

**5.10.7 Digital Meter File**

With all product delivery, the Proponent shall provide an electronic file (in a format approved by the Municipality) that includes the following information:

- Water meter type;
- Water meter size;
- Water meter serial number;
- Water meter test results;
- Water meter register types; and
- Water meter register ID numbers.

## **6.0 Installation Specifications**

The Proponent is responsible for water meter replacement services and associated appurtenance installations. Services include installation management and field supervision, installer training as required, customer service and call center services, material management, quality management, and data management.

### **6.1 Field Personnel**

It is the Proponent's responsibility to ensure that all field personnel and installers are qualified, technically competent, and certified to perform the work they are undertaking before they are allowed to perform that work on their own. All field personnel shall be of an acceptable character to allow them to perform work in an unsupervised manner.

#### **6.1.1 Certifications**

All technicians performing work on meters 15mm to 25mm shall be certified through the Ontario Ministry of Training Colleges and Universities 800A WMI skill set. Each installer shall carry proof of certification with them when performing work. Where the work requires other trades (plumber, electrician, pipefitter), the Proponent will provide certified journeyman trades people. Proof of certification of technicians will be provided to the Municipality at the kickoff meeting and throughout the project as new technicians are added.

#### **6.1.2 Training**

The Proponent shall provide all field personnel with training in the different aspects of work expected during the program, as required. This training should include, at a minimum, the following:

- Water meter installation procedures.
- Customer service.
- Appointment management.
- Handheld and workflow operation.
- Data integrity and importance.
- Safe work practices and procedures.

The Proponent will reserve two (2) spots in each training session so that the Municipality or authorized representatives on their behalf can attend.

As noted in Section 5.3, prior to the commencement of water meter installation works the Proponent and their Subcontractors shall attend a one hour in-person Water Meter Assembly workshop hosted by the Municipality or their representatives at the Municipality of Lambton Shores Public Works Yard located at 9577 Port Franks Road, Thedford. The purpose of the workshop will be to



instruct the Proponent and their Subcontractors on standard assembly procedures within the Municipality to ensure consistency across installations.

#### **6.1.3 Uniform and Picture Identification**

All field personnel will be fully uniformed in a shirt, hat, and jacket. The Proponent's company logo will appear on the uniform in conspicuous and appropriate locations. The uniform and logo shall be distinguishable in all types of weather. All vehicles that are used in relation to the work shall display the same company logo along with the words "Under Contract to the Municipality of Lambton Shores".

Field personnel shall wear Proponent supplied photo identification with the words "Under Contract to the Municipality of Lambton Shores". The installer will ensure the identification is visible at all times when interacting with the property owner/resident. As soon as the installer is inactive, the Proponent shall destroy the identification and confirm such to the Municipality.

#### **6.1.4 Two-way Communication**

The Proponent will ensure that each field representative has a two-way communication device that will allow them to be contacted as required.

#### **6.1.5 Criminal Background Checks**

All staff assigned to perform work at the Municipality's customers' premises shall submit to a Police Criminal Record Check (PCRC). Any members of the Proponent's staff entering water customer properties that fail to submit to, or pass, the PCRC will not be permitted to perform work under this contract. The Proponent will be required to submit proof, to the Municipality of a satisfactory PCRC, for each member of the Proponent's staff, prior to commencing work under this contract.

#### **6.1.6 Competency**

Any of the Proponent's staff found to be unacceptable by the Municipality due to incompetence, improper conduct or posing a security risk, shall be asked to leave the site of work and the Proponent will assign a suitable replacement.

### **6.2 Work Requirements**

#### **6.2.1 Plumbing**

All plumbing work and materials shall conform to the current version of the Ontario Building Code and any other applicable requirements, regulations, and standards.

#### **6.2.2 Performing Additional Work**

For all items contained herein, the Proponent shall ensure that the installers are equipped to perform work on the first visit. Work that requires disturbing finished surface or spaces, must be approved by the property Owner and Municipality prior to commencing.

#### **6.2.3 Approvals for Extra Work**

Billing must be in accordance with the unit rates that have been stipulated in this RFP. Some items may require pre-approval prior to the work commencing which must be approved by the Municipality. In these instances, the Proponent will submit to the Municipality a request in writing (or over the phone in-case of an emergency). This request shall include a picture of the location, a description of the work required, and the specific line items that are being requested. If it is an hourly request, Proponent shall provide the maximum upset hours that will be required to perform the work.

The Municipality will review the information and approve or deny specific requests. Where the Municipality deems the work as unnecessary or excessive, the Proponent shall return to the property and complete only the necessary work to install the meter as per the regular unit rates.

#### **6.2.4 Building Control Valve Replacement**

Where a valve does not exist, is inoperable, does not stop water, is leaking or will not open/close, the Proponent will use the curb stop to shut the water off to the property and replace the valve (billed in accordance with the unit rates set forth in this RFP).

#### **6.2.5 Curb Stop Operation**

Where curb stop operating is required to perform a water meter replacement, the Proponent will locate and operate the curb stop. The Municipality will allow the Proponent to operate the curb stop, as long as the Proponent has received proper training. The cost of operating the curb stop is included within the items of this RFP. The Proponent will ensure that pin locators and curb stop keys are available to their water meter installers for this purpose.

The Proponent shall report daily to the Municipality on inoperable curb stops or curb stops that cannot be located. Issues will be resolved by the Municipality and work reissued to the Proponent once complete.

Should a curb stop be inoperable, the Proponent may opt in low-risk situations to freeze the line using a freeze kit (billed in accordance with the unit rates provided in this RFP). The Proponent is required to capture and report when freezing is taking place to allow the Municipality to plan for curb stop repair/replacement.



The Proponent shall spend a minimum of 30 minutes attempting to locate the curb stop before creating a work order. The Municipality will share existing records of curb stop locations where available.

#### **6.2.6 Installation Specifics**

Meters shall be installed in the existing setting where available. The Proponent shall note all instances where meters are in a vertical setting or in a setting that doesn't support proper installation of the full assembly and requires a larger scope of work to replace the meter assembly.

#### **6.2.7 Adapting to Existing Plumbing**

The Municipality anticipates that the Proponent could come across all types of water pipes during the course of the work. The Proponent is responsible for replacing water meters on properties where the plumbing consists of manufactured copper, galvanized, iron and/or various types of plastic pipe. There will be no extra payment for work on different types of pipe.

#### **6.2.8 Poor Existing Plumbing**

The Proponent is responsible for the plumbing system for a period of ten (10) business days after the replacement of the water meter. It will be presumed that any leaks reported to the Proponent or the Municipality within this time is a result of work performed by the Proponent's installer and will necessitate, therefore, further investigation by the Proponent, followed by a report of findings to the Municipality. Having received and considered the Proponent's report, if the Municipality decides that a leak is likely the result of the meter installation process or materials installed, the Proponent shall make the required repairs, as necessary. Where the plumbing encountered is in poor condition, the Proponent shall make the property owner aware of its condition, and the conversation will be noted in the relevant work order. In this circumstance, the Proponent shall get authorization to proceed from the Municipality and property owner before any work commencing.

It is anticipated that some properties may have non-approved service lead pipes (i.e.: galvanized services). In instances where the Proponent encounters non-approved service materials the Proponent shall cease with the installation of the meter assembly and shall immediately notify the Municipality. The replacement of the associated meter assembly shall be assigned to the Municipality and shall be removed from the Proponents assigned list.

In instances where, during installation, the Proponent identifies an illegal connection to the water service the Proponent shall immediately notify the Municipality and provide photos of the installation. The Municipality shall coordinate the removal of the illegal connection with the Homeowner outside of this program.



In instances where the existing water meter assembly does not include a backflow preventor, the Proponent shall advise the Homeowner of the installation and ask if the property has expansion tanks installed. If no expansion tanks are installed on the property the installer shall advise the Homeowner to contact a plumber and investigate their necessity.

#### **6.2.9 Replacement Criteria**

For the purpose of this RFP, the Municipality has defined all work types as:

- Supply and installation of the water meter assembly which is defined within this RFP.

#### **6.2.10 Electrical Ground**

The Proponent shall not tamper with any existing electrical grounds connected to the water service. If the ground wire interferes with the installation, then it will be relocated by a qualified electrician in accordance with electrical regulations.

#### **6.2.11 Temporary Electrical Ground**

In all cases where existing grounding does not exist, the Proponent shall ensure a temporary electrical ground is used before and after the meter location to ensure that electrical continuity is not compromised.

#### **6.2.12 Sealing the Water Meter**

The Proponent will seal the water meter using copper wire, a Proponent-supplied seal and seal wire which shall ensure that the water meter's inlet meter nut and the register/terminal screws cannot be tampered with.

#### **6.2.13 Worksite Cleanup**

The Proponent will ensure the work site is free of debris and garbage prior to the installer's departure from the site. Pictures shall be taken and uploaded onto CityWide to document pre and post work conditions.

#### **6.2.14 Cover Box or Access Panel Installation**

A cover box or access panel will be installed as required in finished basements. The cover box or access panels should be made of a suitable material that allows the property owner to paint or cover the box as necessary. The Proponent shall supply the following types and sizes of cover boxes (or as otherwise approved). The Proponent must provide pricing for all requested cover box and access panel types a follows:

- MDF box 400mm x 475mm x 150mm
- MDF box 400mm x 475mm x 100mm
- MDF box 400mm x 475mm x 50mm
- Plastic (spring release) flat panel 300mm x 300mm

#### **6.2.15 Task Categories**

Where Proponent personnel are not able to complete an installation for any reason, the Proponent shall keep the work order up-to-date including the reason why the work order could not be completed. The Proponent shall provide digital picture(s) and comments that can be used to review potential solutions. The following categories should be used for work orders to ensure consistency through the program:

- Curb Stop Locate – unable to locate curb stop.
- Curb Stop Repair – repair required on the existing curb stop including supporting information on why it's required.
- Hard Refusal – the property owner explicitly refuses to comply with the installation after which the Municipality will try and deal with the owner.
- Soft Refusal – the property owner does not respond to any contact attempts
- Owner Not Prepared – the owner must prepare an adequate space for a proper inspection/installation to be completed.
- Missed Appointment – a customer misses a scheduled appointment which requires rescheduling.
- Multiple Missed Appointments – a customer misses multiple scheduled appointments.
- Poor Plumbing – where the Proponent feels that damage/leaks would be the inevitable result of any work conducted OR the scope of work is not simple and would require a large amount of work.
- Safety Hazard – where work conditions do not allow for the installation to be completed safely.
- Second Person Required – the work requires an additional person on-site to perform the work safely.
- Unable to Locate Meter – where the Proponent is unable to locate a meter.
- Unusual or Difficult Meter – where the existing meter requires additional support to swap out.
- Vacant Premise – where the property is abandoned and no longer occupied.
- Work Type Incorrect – where the Proponent feels that the work type provided conflicts with the work required on-site.

During the startup meeting, the task categories are to be finalized including team responsibility of who and how work orders are to be completed between the Proponent and Municipality.



**6.2.16 Return Visits**

The Proponent is responsible for all costs associated with return visits required to complete installations. Once a property has a documented Task requiring Municipality action or approval, the Proponent will not return to the property without authorization from the Municipality.

**6.2.17 Other Work**

The Proponent shall not perform any other work at any property except what is required to install the products directly associated with this Contract. Under no circumstances will the Proponent accept compensation of any kind for services performed relating to a water meter replacement. The Proponent shall not sell, promote, market, or communicate to the Municipality customers any services or products not related to this Contract. All communications to the customer shall be approved by the Municipality prior to distribution.

**6.2.18 Meter Removal and Disposal**

The Proponent shall store removed water meters and equipment for a period of 120 days following their removal, after which the Proponent will dispose of removed products. All meters are to be stored and labelled in a fashion that allows the Municipality to request a meter to be pulled at any time during this 120-day period for verification purposes. The Proponent is required to pull the requested meter within ten (10) days of the request. The Proponent should also ensure that all existing information related to the existing meter and encoder are documented and provided to the Municipality, including any other relevant information that would be of value for the Municipalities records.

**6.2.19 Materials**

The Proponent shall ensure all materials meet the following specifications, at a minimum:

- NSF/ANSI 372 and NSF 61 Annex G:
  - All material that may come into contact with potable water shall conform to these certifications, at a minimum. All materials that come into contact with potable water shall have the “NSF” permanently stamped on the body of the product.
- Meter flanges and tail pieces – 15mm to 25mm:
  - Male thread or MIP two-part meter couplings with a hole in the meter coupling nut that will allow the water meter to be sealed to the tailpiece.
- Meter flanges and fittings:
  - Water meter flanges 37mm to 64mm will be brass, water meter industry standard oval. The connection will be threaded, solder or compression fittings.

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- Water meter flanges 64mm and greater will be brass, water meter industry standard circle.
- Water meter flanges will be brass with threaded, solder or uni-flange type connections.
- 12mm to 25mm Building Control Valves:
  - Ball valve type, two-piece, forged brass, quarter-turn, B43-xxxW-NL style, stop and waste level handle having a 1034kPa (150psig) / 600WOG Rating. Connections may be compression or solder. Where the plumbing will allow, preference will be given to an angle stop and waste valve into a meter tailpiece.
- 40mm to 50mm Valves:
  - Building control valves (40mm to 50mm): Ball valve type, two-piece, forged brass, full-port, quarter-turn, and lever handle having a 1034 kPa (150psig) / 600WOG Rating. The valve connection can either be solder, threaded, or compression.
- 64mm and Greater Valves:
  - All valves 64mm and greater: rising stem gate valve conforming to AWWA C515-15 and the connection can be threaded or flanged.
- Pipe, fittings and solder:
  - All copper pipe shall comply with the Ontario Building Code. Only lead-free solder shall be used.
  - All copper fittings shall be made of 99.9% copper or PEX. Plumbing fittings may include 90o, 45o, couplings, unions, and tees.
  - Brass adapters to iron or plastic pipe. Where an adapter has multiple parts to create a seal, all components of an adapter are considered a single fitting.
  - Flanges conform to AWWA C115/A2.15-11 American National Standard for flanges cast-iron and ductile-iron pipe with threaded flanges.
  - Installing fittings to PEX shall include a stiffener insert to ensure the pipe integrity is maintained. Inserts will not be considered a fitting.
- Compression fittings:
  - These are to be considered fittings.
- Washers and gaskets:
  - Neoprene or approved equivalent.
- Bolts, nuts, and washers:
  - All bolts, nuts, and washers shall conform to AWWA C111 and ASTM F-593 and ASTM F-594.
- Meter seals and sealing wire:
  - The Proponent shall submit for approval the proposed seals and sealing wire that will be used to seal the water meter.
- Staples:
  - "U" staples properly sized for any wire installation required.
- Wire clamps:
  - Plastic "b" shaped and attached to the wall with a screw that keeps all wires taunt. Cable ties may be used to secure wire to piping. No wire nail clips will be allowed.



- Cover box:
  - MDF manufactured unpainted cover box with dimensions of 5cm x 40cm x 60cm or 10cm x 40cm x 60cm, glued and stapled and include an easy to mount support.
- Plastic cover panel:
  - A white plastic 30cm x 30cm panel with a concealed mounting bar.
- Dual Check Valve
  - Series LF7R, lead free, size dependent on configuration.
- Nipple
  - Red brass, 3" length.

### **6.3 Data Management**

The Proponent shall implement a meter installation system to support overall management of the program. The system shall track the various Proponent processes, document occurrence of activities and track all related program components including at a minimum: installation blackout periods, contact history with each customer, appointments, installations, surveys, tasks, inventory and record of follow up pertaining to complaints. As noted previously, the Proponent shall receive access for utilization of the Municipality utilized CityWide platform.

#### **6.3.1 Initial Customer Information**

The Municipality will provide in electronic format the following confidential customer information to the Proponent:

- Account Number
- Customer Number
- Owner
- Route
- Municipal Address
- Meter ID
- Meter Installation Date
- Meter Location
- Meter Manufacturer
- Meter Size
- Roll Number
- Owner Address
- Phone Number(s)

Should the Municipality's data be incomplete or inaccurate, then the Proponent is responsible for working with the data provided and for filling in any necessary gaps that may be missing and required.



### **6.3.2 Installation Information**

The Proponent and Municipality will define the type of data that is to be collected and the format in which it will be passed back to the Municipality. At a minimum, the Proponent will be required to collect and store the following information:

- Date and time of installation
- Account number
- Work order number
- Service address
- Customer contact information
- GPS latitude and longitude
- Provided work types
- Existing meter size
- Existing meter type
- Existing meter manufacturer
- Existing meter serial number
- Existing meter number of dials to the billable unit
- Existing meter reading
- Existing water service type
- Existing water service size
- New meter size
- New meter type
- New meter manufacturer
- New meter register model
- New meter serial number
- New meter register type
- New number of dials to the billable unit
- New number of dials encoded
- New water service type
- New water service size
- New meter location
- New meter seal number
- Billable work performed to install meter
- All materials used during installation
- Proponent name and employee number of installer(s) who completed the work
- Notes on any leaks and damage that was present prior to the work commencing
- Customer contact transcript
- Any additional information that may seem relevant

### **6.3.3 Handheld Digital Work Order Unit**

The Proponent shall supply all installers with a digital handheld work order unit that is secure and provides installers with access to all required systems.

#### **6.3.4 Reporting**

The Proponent shall work with the Municipality to define the exact reports and associated submission frequencies. At a minimum, the Proponent will create and supply the following reports at the stated frequency that may be refined as the project progresses:

- Database Balance Report – shows the number of work orders and their respective status.
- Production Reports (Bi-Weekly) – showing a summary of planned and actual production along with a detailed report that supports this summary.
- History of Contact (Monthly) – showing a list of customers the Proponent did and could not contact and history of any contact.
- Future Appointments (Bi-Weekly) – detailing a list of work orders that have secured future booked appointments.
- Invoice Summary Report (Monthly) – detailing what work was completed per location to support invoicing.

All reports should be created and provided in Excel and PDF formats where available.

Proponents should take ample digital colour images of high quality of both existing, progress, and completed conditions to form an accurate and thorough record which shall be made available to the Municipality within 5 days of installation. Should the Proponent be unable to meet this requirement, or fall behind throughout the program, they shall utilize additional resources as required to bring the reporting into compliance with this section.

#### **6.3.5 Appointments**

Proponents shall allow customers to book an appointment online or by calling the Proponent's call center within a four (4) hour appointment block. Customers should be communicated with a minimum of 30 minutes before an installer expects to arrive on-site. Outgoing appointment scheduling calls shall not begin until a minimum of 14 calendar days have passed since the mailing of the Introductory Letter (Letter #1) as noted under section 6.4.1 – Required Outreach.

Proponents will not enter or perform any work on a property without the permission and continued presence of a responsible adult (18 years of age or older). Proponents must verbally detail the proposed scope of work to a customer and receive verbal approval from an individual who is authorized to speak on behalf of any owner.

### **6.4 Public Outreach**

A well-planned public outreach program is necessary to ensure that the project progresses smoothly and is completed in a timely documented manner. It is

important that the program generates trust and goodwill, participation, maximizes satisfaction and minimizes complaints, and helps owners understand the importance of the program that generates successful completion.

The Municipality has existing branding that must be incorporated into the outreach and overall program. Proponents will be responsible for designing and executing the public outreach program and shall provide samples of all proposed material to the Municipality for review and approval.

It is the intent to use the Municipality's website and social media channels as part of the program.

#### **6.4.1 Required Outreach**

Proponents should complete the following contact attempts, at a minimum, and ensure that the Municipality has the opportunity to participate in as many installations as possible. Proponents are required to document each attempted contact (date and time) and utilize registered mail. All registered mail records shall be provided to the Municipality for their records.

##### **A. Introductory Letter – (#1)**

The Proponent will develop, print, and deliver via standard mail an introductory program letter to both the registered property owner and resident (if different). This letter will introduce the program, the Proponent, and describe the overall benefits and process. Proponents will be responsible for all costs associated with this letter (development, printing, envelopes, mailing costs, etc.). This letter is subject to review and approval by the Municipality.

##### **B. Appointment Pamphlet – (#2)**

The Proponent will develop a full trifold colour pamphlet that initiates property owners to book an appointment. Proponents will be responsible for all costs associated with this letter (development, printing, envelopes, mailing costs, etc.). This letter is subject to review and approval by the Municipality. The pamphlet will be delivered via standard mail, costs to be borne by the Proponent.

##### **C. Reminder Letter – (#3)**

The Proponent will develop a reminder letter that shall be sent approximately two (2) weeks from the Appointment Pamphlet and every two (2) weeks for three (3) reminders. Proponents will be responsible for all costs associated with this letter (development, printing, envelopes, mailing costs, etc.). This letter is subject to review and approval by the Municipality. This letter will be delivered via standard mail, costs to be borne by the Proponent.

**D. Door Tag – (#4)**

The Proponent will develop, print, and deliver by hand door tags that can be left at the property during canvassing where there is no answer, or a resident does not show up for an appointment. Proponents will be responsible for all costs associated with this task (development, printing, envelopes, mailing costs, etc.). This tag is subject to review and approval by the Municipality.

**E. Phone Attempts – (#5)**

The Proponent will attempt to contact customers by phone a minimum of twice a week, with at least one attempt being after 5:00:00 p.m. Where a phone number is not available, the Proponent will attempt to obtain a number by using 411, reverse phone number lookup, or other similar methods. Proponents will be responsible for all costs associated with these calls.

**F. Final Letter – (#6)**

The Proponent will send out a final letter that gives customers one last opportunity to participate in the program and help them understand future cost implications for not participating. This will only be done once the Proponent has attempted all five (5) previous methods with no success deeming a refusal. Proponents will be responsible for all costs associated with this letter (development, printing, envelopes, mailing costs, etc.). This letter is subject to review and approval by the Municipality. The final letter shall be delivered via **registered mail**.

**6.5 Quality Control**

The Proponent shall undertake quality inspections on all works installed throughout this program to ensure all works are performed both to industry requirements and best practices, but also that all requirements set forth in this RFT are met.

Any deficiencies noted as part of the program are to be formally documented and rectified as part of this program.



**7.0 Form of Proposal**

The submittal forms included in Appendix B shall be included within their respective envelopes as part of the Proponents submission.



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**APPENDIX A**  
**Sample Agreement**

## **AGREEMENT**

**THIS AGREEMENT** made as of \_\_\_\_\_ day of \_\_\_\_\_, 2026.

**BETWEEN:**

**The Corporation of the Municipality of Lambton Shores**  
(hereinafter called "the Municipality")  
-and-

\_\_\_\_\_ (hereinafter called "the Contractor")

**WHEREAS** the Corporation of the Municipality of Lambton Shores is desirous that certain Works should be completed, viz. Request for Proposal 2026-01 – 2026 Capital Water Meter Replacement Program and has accepted the Tender by the Contractor 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 Tender
  - 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 Contractor, as hereinafter mentioned, the Contractor 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 Contractor 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 Contractor of the amount or amounts certified for payment there under, shall constitute a waiver and release by the Contractor of all claims by the Contractor 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:

) \_\_\_\_\_

Doug Cook, Mayor

) \_\_\_\_\_

Stephanie Troyer-Boyd, Clerk

**APPENDIX B**  
**Technical Proposal Submittal Form**  
**Cost Proposal Submittal Form**

## **Technical Proposal Submittal Form (Enclose in Envelope 1)**

Request for Proposal: RFP 2026-01

Closing Deadline: Tuesday, February 6, 2026 @ 2:00:00 PM

Project Description: 2026 Capital Water Meter Replacement Program

For: The Municipality of Lambton Shores

Submitted By: \_\_\_\_\_ (Company Name)

\_\_\_\_\_ (Contact Name)

I/WE, THE UNDERSIGNED, HEREBY SUBMIT THIS PROPOSAL FOR THE PROVISION OF THE GOODS AND/OR SERVICES ARE DESCRIBED WITHIN THE REQUEST FOR PROPOSAL DOCUMENT FOR THE ABOVE NAMED PROJECT.

I/WE HAVE CAREFULLY EXAMINED THE DOCUMENTS AND HAVE A CLEAR AND COMPREHENSIVE KNOWLEDGE OF THE REQUIREMENTS AND HAVE SUBMITTED ALL RELEVANT DATA. I/WE AGREE, IF SELECTED, TO PROVIDE THOSE GOODS AND/OR SERVICES TO THE MUNICIPALITY IN ACCORDANCE WITH THE TERMS, CONDITIONS, AND SPECIFICATIONS CONTAINED IN THE PROPOSAL DOCUMENT AND OUR SUBMISSION.

### **Proposal Submission**

Proposal submission shall be irrevocable and open for acceptance for the Bid Acceptance Period, a period of 120 days following the date of the closing.

The Proponent submits that they have thoroughly reviewed this document together with the following Addenda and hereby accepts and agrees to all provisions and conditions stated herein and has included fully for all requirements in the Pricing.

### **Addendum Acknowledgement**

Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

### **List of Suppliers and Sub-Contractors**

The Proponent also agrees that the following is a complete list of suppliers and sub-contractors that will be required in the performance of the Work and that no additions, deletions, or changes to this list will be permitted without the approval of the Municipality.

Supplier and/or Sub-Contractor	Address	Product/Service

### **Harmonized Sales (H.S.T.) Tax Information**

Please provide in the space below your H.S.T. Registration Number. Please note that all invoices provided to the Municipality must show the H.S.T. Registration Number and show this tax on a separate line.

H.S.T. Registration Number: \_\_\_\_\_

### **Pricing**

The total price including all applicable taxes in legal currency of Canada must be enclosed and sealed in a **separate COST PROPOSAL ENVELOPE (Envelope 2)** and included with your submission in order for your bid submission to be considered.

This Proponent's Submission is made entirely in accordance with the Document. By your signature hereunder, it is deemed that you have read and agreed to all terms and conditions in the same manner as had such terms and conditions above your signature, and that you have the authority to bind the Proponent.

### **Company Name and Address:**

\_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_, 2026.

Name/Title: \_\_\_\_\_ Signature: \_\_\_\_\_

Witness: \_\_\_\_\_ Signature: \_\_\_\_\_

**Note**

If the Proposal is submitted by or on behalf of any Corporation, it must be signed in the name of such Corporation by someone who has the authority to bind the Corporation.

If the Proposal is submitted by or on behalf of any Partnership, it must be signed in the name by someone who has authority to bind the partnership and witnessed.

If the Proposal is not being submitted on behalf of a Corporation, the Bidder's signature must be witnessed.

## **Cost Proposal Submittal Form (Enclose in Envelope 2)**

Request for Proposal:

RFP 2026-01

Closing Deadline:

Tuesday, February 6, 2026 @ 2:00:00 PM

Project Description:

2026 Capital Water Meter Replacement Program

For:

The Municipality of Lambton Shores

Submitted By:

\_\_\_\_\_ (Company Name)

\_\_\_\_\_ (Contact Name)

### **Cost Proposal Submittal Form Schedule of Quantities and Unit Prices**

Proponents shall Complete Cost Proposal Submittal Form, Schedule of Quantities and Unit Prices in the provided excel spreadsheet. Refer to Tab A1 for completion and inclusion as part of this Submittal Form.

Pricing shall only be submitted by way of the provided Schedule of Quantities and Unit Pricing form. Proponents who fail to provide pricing for all line items, provide pricing outside of the provided form, or opt to no bid specific items will render their bid as informal.

Proponents may only provide pricing assumptions if they feel it provides additional clarity. Assumptions included with a Proponent's submission that alter the intended pricing description, may be ruled as informal. To avoid this circumstance, Proponents must provide any proposed deviations in writing to the Municipality prior to the deadline for questions.

Pricing shall be submitted in Canadian dollars.

#### **Company Name and Address:**

\_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_, 2026.

Name/Title: \_\_\_\_\_ Signature: \_\_\_\_\_

Witness: \_\_\_\_\_ Signature: \_\_\_\_\_

**Note**

If the Proposal is submitted by or on behalf of any Corporation, it must be signed in the name of such Corporation by someone who has the authority to bind the Corporation.

If the Proposal is submitted by or on behalf of any Partnership, it must be signed in the name by someone who has authority to bind the partnership and witnessed.

If the Proposal is not being submitted on behalf of a Corporation, the Bidder's signature must be witnessed.

**APPENDIX C**  
**Proposed Water Meter Replacement Map**

**APPENDIX D**  
**Request for Proposal Envelope Submission Cover**