THE CORPORATION OF

THE

TOWNSHIP OF GEORGIAN BAY

REQUEST FOR PROPOSAL
No. 2017 - 08

Supply, Implement and Provide Ongoing Support Services with Respect to an Electronic Document and Records Management System
TOWNSHIP OF GEORGIAN BAY

INDEX TO PROPOSAL DOCUMENTS

SECTION:

A INFORMATION TO BIDDERS
B TERMS OF REFERENCE
C PROPOSAL SUBMISSION DOCUMENTS
TOWNSHIP OF GEORGIAN BAY

SECTION A

INFORMATION TO BIDDERS
TOWNSHIP OF GEORGIAN BAY

SECTION A

INFORMATION TO BIDDERS

A.1 SCOPE OF PROPOSALS:

The following is a request for proposals to provide the supply, implementation and ongoing support services with respect to an Electronic Document and Records Management System (EDRMS) to the Township of Georgian Bay. The requirements of the submission are outlined in Section C.

A.2 QUESTIONS & CLARIFICATIONS

It will be the Proponent's responsibility to clarify any details in question not mentioned in this contract before submitting their Proposal.

Questions relating to this Proposal must be received by Wednesday, May 17, 2017 before 2:00 p.m. and can be made to the attention of: Jessica Gunby, Clerk (A), 99 Lone Pine Road, Port Severn, ON L0K 1S0, jgunby@gbtownship.ca or (800) 567-0187 x. 242.

Answers to pertinent questions will be responded to and shared with other proponents, via an addendum, to ensure a level playing field for all Proponents. Questions received after this date and time will not receive a response.

A clarification does not form part of the Proposal document.

Any modifications to the document, or answers to questions, will be in the form of addendum, which will be issued by the Clerk (A) and posted on the Township of Georgian Bay website in accordance with the schedule of events in Section A.3 below.

Proponents are notified that any errors or omissions in the Proposal may render the Proposal invalid.

A.3 SUBMISSION, CLOSING AND OPENING OF PROPOSALS:

Proposals must be submitted in a sealed envelope that should be labeled RFP 2017 - 08 Supply, Implement and Provide Ongoing Support Services with Respect to an Electronic Document and Records Management System and will be received until the proposal closes at 2:00 p.m. local time on Wednesday, May 31, 2017 by:

Jessica Gunby, Clerk (A)
Township of Georgian Bay Municipal Office
99 Lone Pine Road
The Envelope must include the name of the company supplying the response on the outside of the sealed envelope.

**Each proponent is asked to submit one (1) original and two (2) copies of their proposal.**

The Proposal envelope will be marked by the Township’s authorized representative with the time and date that the envelope was received at the Administration Office. The use of any means of delivery of a Proposal shall be at the risk of the Proponent.

All Proposals must be submitted on corporate letterhead, in non-erasable medium, and duly signed by an authorized official.

It is the responsibility of the Proponent to ensure that proposals are delivered to the Clerk (A) by the proposal closing time. Misdirected couriered proposals, proposals received after the closing date / time / place will **not** be accepted and will be returned unopened. Requests for extensions of closing date or time will **not** be granted and adjustments to proposals by telephone or facsimile will not be considered.

All proposal submissions must conform to the terms and conditions set out herein. Failure to do so may cause the submission to be rejected.

A Proponent may withdraw or alter the Proposal at any time up to the specified time and date for Proposal closing by submitting a letter bearing the Proponent’s signature to the Director of Financial Services or the authorized representative who will mark thereon the time and date of receipt. The Proponent’s name and the contract number shall be shown on the envelope containing such letter.

To ensure similarity in proposal presentation and to facilitate the comparison of competing proposals by the evaluation team, proponents shall complete the Township’s forms supplied within the document (Section C).

**Schedule of Events:**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal Release</td>
<td>May 3, 2017</td>
</tr>
<tr>
<td>Deadline for Queries</td>
<td>May 17, 2017</td>
</tr>
<tr>
<td>Addendum Release – If Required</td>
<td>May 18, 2017</td>
</tr>
<tr>
<td>Closing Date</td>
<td>May 31, 2017 – 2:00 p.m.</td>
</tr>
<tr>
<td>Proposal Opening</td>
<td>May 31, 2017 – 2:00 p.m.</td>
</tr>
<tr>
<td>Anticipated Notice of Award</td>
<td>June 14, 2017</td>
</tr>
</tbody>
</table>
Proposal openings will be public. The names of proponents submitting a proposal will be available upon request.

Unsuccessful bidders names and bid values become public information and may be disclosed upon a request of the public. Portions of successful bids become a public document subject to the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA).

A.4 PROCESS REQUIREMENTS:

In addition to the requirements of Section A.3, bidders may be asked to have a representative(s) attend a Review meeting with Township staff (In-Camera) to give a brief overview of their proposal, and to answer any questions.

A.5 TOWNSHIP CONTACT PERSONS:

Questions with respect to this process or requests for further information, or clarification must be directed to the Clerk (A), Jessica Gunby, via e-mail (jgunby@qbtownship.ca).

A.6 SELECTION PROCESS:

The Municipality will not necessarily accept the lowest price or any proposal. Any implication that the lowest price or any proposal will be accepted is hereby expressly negated. Proponent selection will be on the basis of those proposals having the greatest overall benefit to the Township of Georgian Bay.

A.7 REJECTION OF PROPOSALS:

The Municipality reserves the right to reject any and/or all proposals received. The Municipality is not under any obligation to award a contract, and reserves the right to terminate the Request for Proposal at any time for any reason, and to withdraw from discussions with all or any of the proponents who have responded. The receipt and opening of a proposal does not constitute acceptance of any proposal.

The proposal will be automatically disqualified if there is failure to comply with terms, requirements and conditions as set out in the RFP.

A.8 RESERVATION OF RIGHT:

After the closing date and time, proponents will not have the right to change conditions, terms or prices of their proposal.
The lowest or any proposal will not necessarily be accepted. The Township reserves the right to award in whole or in part based on the best interests of the Township.

All Proposals will be irrevocable for a period of sixty (60) days from the closing date of the Proposal or until a contract is signed with the successful Proponent(s), whichever comes first.

A.9 LIMITATION OF DAMAGES:

The Proponent waives any claim for loss of profits, expenses, liabilities, costs, losses or damages incurred, sustained or suffered by themselves prior or subsequent to or by reason of the acceptance or the non-acceptance by the Township of any Proposal or by reason of any delay in the acceptance of a Proposal, or matters in respect of the competitive process, except as provided in the Proposal. All costs incurred in the preparation and presentation of the Proposal shall be wholly absorbed by the proponent.

All proposals and supporting documentation submitted with the proposal or resulting from the project shall become the property of the Township of Georgian Bay.

A.10 ERRORS & OMISSIONS

It is understood, acknowledged and agreed that while this Proposal includes specific requirements and specifications, and while the Township has used considerable efforts to ensure an accurate representation of information in this proposal, the information is not guaranteed by the Township to be comprehensive or exhaustive. Nothing in the proposal is intended to relieve the Proponents from forming their own opinions and conclusions with respect to the matters addressed in the Proposal. There will be no consideration of any claim, after submission of Proposals, that there is a misunderstanding with respect to the conditions imposed by the contract.

A.11 GOVERNING LAW:

Any contract resulting from this Request for Proposal shall be governed by and interpreted in accordance with the laws of the Province of Ontario.

A.12 INDEMNIFICATION AND INSURANCE:

The successful Proponent will, at all times, indemnify and save harmless the Township, their officers, employees and agents from and against all claims, demands, losses, expenses, costs, damages, action, suite or other proceedings
made, sustained, brought or prosecuted that are based upon, or caused in any way by anything done or omitted to be done by the Proponent or any of its officers, directors, employees, or agents in connection with the services performed, purportedly performed or required to be performed by the Proponent under this proposal call and subsequent contractual agreement.

**General Commercial Insurance**

Proponents shall, at his or her expense, obtain and keep in force during the term of this agreement, Commercial General Liability Insurance satisfactory to the Township, be written by an insurer licensed to conduct business in Ontario and include but not be limited to the following:

Subject to limits of not less than Two Million ($2,000,000) inclusive per occurrence. Coverage shall include but not limited to bodily injury including death, personal injury, damage to property including loss of use thereof, premises and completed operations, contractual liability – written and oral, contingent employers liability, no exclusion for a pollution condition resulting from a hostile fire and contain a cross liability, severability of insured clause in respect of the named insured. The Municipality is to be added as an additional insured but only with respect to liability arising out of the operations of the Named Insured.

The Proponent shall provide the Township with a letter from their insurance provider confirming your ability to meet the insurance requirements as set out in the Contract. Prior to commencement of the agreement and upon the placement, renewal, amendment, or extension of all or any part of the insurance, the successful proponent shall promptly provide the Township with confirmation of coverage and, if required, a certified true copy(s) of the policy(s) certified by an authorized representative of the insurer together with copies of any amending endorsements applicable to the agreement.

That 30 days prior notice of an alteration, cancellation or material change in policy terms which reduces coverage’s shall be given in writing to the Township;

It is expected by the Township that the Certificate(s) of Insurance will provide confirmation that all insurance requirements as stated under Section A. 13, General Commercial Insurance have been met.

**A.13 WORKPLACE SAFETY & INSURANCE BOARD (WSIB)**

The proponent shall submit with the proposal document, a valid clearance certificate from the Workplace Safety and Insurance Board (WSIB) stating that all assessments or compensation payable to the WSIB have been paid.

**A.14 HEALTH & SAFETY**
All work performed under this contract must be carried out in accordance with the terms and conditions of the Occupational Health and Safety Act and its regulations.

A.15 CONFIDENTIALITY STATEMENT

The successful Proponent shall at all times maintain confidentiality of all materials, information and all business related to the Township that the successful proponent may come into contact with through implementation and any continued relationship as the contract may warrant.

A.16 MUNICIPAL FREEDOM OF INFORMATION AND PROTECTION PRIVACY ACT (MFIPPA)

In accordance with MFIPPA, this is to advise that any personal information Proponents provide is being collected under the authority of the Municipal Act and will be used exclusively in the selection process. Proponents are reminded to identify in their Proposal material any specific scientific, technical, commercial proprietary, or similar confidential information, the disclosure of which could cause them injury. Complete Proposals are not to be identified as confidential. The information contained in this Proposal document may be utilized by the Proponent solely for the purpose of preparing a Proposal for submission to the Township. Any other use of the information for any other purpose is not authorized by the Township.

A.17 HISTORICAL PERFORMANCE & LITIGATION

The Township reserves the right to disqualify and remove from the proposal process those Proponents whose historical performance has been unsatisfactory in terms of failure to meet contract specifications, terms and conditions or for Health and Safety violations.

The Township may, in its absolute discretion, reject a proposal if the potential supplier, or any officer or director of the potential supplier is or has been engaged, either directly or indirectly through another corporation, in a legal action against the Township, its elected or appointed officers and employees in relation to:

i) Any other contracts or services; or

ii) Any matter arising from the Township’s exercise of its powers, duties or functions.
TOWNSHIP OF GEORGIAN BAY

SECTION B

TERMS OF REFERENCE
BACKGROUND:

The following is a request for proposals to provide the supply, implementation and ongoing support services with respect to an Electronic Document and Records Management System (EDRMS) to the Township of Georgian Bay. The requirements of the submission are outlined in the Request for Proposal.

PRE-AMBLE:

The Township of Georgian Bay is a lower tier municipality in the District of Muskoka. As such, it delivers planning, parks, libraries, roads, limited social services and other ancillary services. The close proximity of the Township to the urban population of Ontario has contributed to its historic and contemporary role as an important cottaging, recreation and tourism destination. The Township has a permanent resident population of approximately 2,100 and an additional seasonal population of approximately 15,000. Local census data shows rapid growth and changing demographics creating pressure for year round retirement and seasonal residences. The Township is comprised of three urban communities – Port Severn, Honey Harbour and MacTier as well as waterfront and rural areas.

The Township of Georgian Bay is a water-based community located on the southern edge of the Canadian Shield and possesses a rich and rugged natural landscape of lakes, rock, forested and wetland areas. The northern part of the Township is traversed by the Muskoka River watershed while the southern boundary is formed by the Severn River watershed; these watersheds discharge into Georgian Bay. The result is serenity of our inland lakes, a historic navigable waterway of locks, lakes and rivers, and the unique coastline of Georgian Bay including the southern portion of the 30,000 islands. The unique environmental features of this area have contributed to its recognition as a world-renowned Heritage Coast and part of the Georgian Bay Littoral Biosphere Reserve by UNESCO.

This breath-taking natural and scenic setting, which offers high quality living and recreational opportunities, has played a significant role in the settlement of the Township and continues to define its character and identity. The integrity and strength of the community make the Township of Georgian Bay a unique place to live for our full time and seasonal residents. Known as a balanced community, it has also earned a reputation as a year-round tourist destination respected internationally for its spectacular scenery and recreation for all seasons.
There is a growing interest in preserving the history of the Township of Georgian Bay. In maintaining this history as well as ensuring provincial compliance of records, the Township is in pursuit of a systematic way to organize all paper and electronic records that date as far back as 1971, with the amalgamation of the Townships of Baxter, Gibson and Freeman. Without an Archival facility, all historical and archival municipal records of the township remain the responsibility and within the care of the Township of Georgian Bay.

Scope/Process:

The EDRMS will support the Township’s recorded information. The system will provide capability to manage the creation, profiling, indexing, classification, distribution, storage, retrieval, archiving and destruction / preservation of all physical and electronic records in a systematic, defined manner in compliance with appropriate legislation, by-laws and regulations. The system will also support and enhance workflow processes and decision support needs in the business and service operations.

The project goals and objectives include:

a) Ensure compliance with regulatory and municipal requirements for records management;

b) Provide staff with an easy, intuitive environment for effectively managing their records;

c) Improve administrative efficiency by making it easier and quicker to access records;

d) Manage the creation and growth of records;

e) Control operating costs through the reduced need for physical and electronic storage;

f) Provide a scalable system that can grow with the needs of the Township;

g) Minimize litigation risk through a consistently applied records management program;

h) Outline a strategy for the management of existing data from shared drives, existing applications and software systems;

i) Provide staff with specialized training in the creation, maintenance and support of a records management system.
Project Scope

The successful Proponent will be involved in a phased implementation approach in all areas of the project, from start to post go-live support for each Records Management Working Group (RMWG) member. The implementation plan will be refined in conjunction with input from the RMWG members and will correspond to the high level activities and associated deliverables. This is anticipated to include, but is not limited to:

a) Project Management:
   i) Assist with the project plan and schedule;
   ii) Assist with project communications and change management;
   iii) Manage quality assurance and testing;
   iv) Manage consultant resources; and
   v) Assist with managing project risk and scope.

b) System Design:
   i) Provide hardware and software architecture;
   ii) Provide design for software modification and integration;
   iii) Deployment; and
   iv) Provide a strategy for the management of existing paper and electronic records from shared drives, existing applications and software systems using The Ontario Municipal Records Management System (TOMRMS).

c) Training and Documentation:
   i) Technical and administrative training for IT Services staff;
   ii) On-site training at a “train the trainer” level for the RMWG;
   iii) Documentation:
      • Online Help kept up-to-date with scheduled releases;
      • General User Manuals updated with new releases and available in an electronic format; and
• Comprehensive, current, searchable technical documentation provided for the IT Service Desk.

d) Deployment

i) Provide an estimated timeline and schedule for implementation.

e) Post go-live service and support.

**Project Management:**

- Going live on time and on budget;
- Improved communication and reporting for project team and senior management; and
- Change management processes are consistently followed throughout the project.

**Current Technical Environment**

a) Core Business Application Standards:

- Microsoft Office 2010
- Adobe Reader X
- Vadim
- Vadim HRIS
- Ace InfoBite
- Firehouse
- Internet Explorer 11 / Chrome / Firefox
- Miscellaneous other applications, mostly web-based including such applications as: Marmak, iCompass / FilePro, CGIS, Municipal Voter View, Municipal Connect,

**Servers:**

- Window servers are running in a VMware ESXi Environment
• Server Operating Systems are standardized on Server 2008 R2 and Server 2012 R2
• Currently running Microsoft SQL 2005 and SQL 2008 for database servers
• Exchange 2010 for email messaging services
• Quest / vWorkspace – Terminal Services
• Vadim for the financial application
• MS SQL 2012

Proposed software must support future releases of the above mentioned environment.

Clients:

• A mixed environment of Windows 7 – 64bit and Terminal Services through Dell vWorkspace on Windows Server 2008 R2 – 64bit
• Vadim – iCity v2.00
• Adobe Acrobat Reader 10 or higher
• Microsoft Office Suite 2010 or higher
• Multiple browsers (Internet Explorer 11, Firefox, Chrome)
TOWNSHIP OF GEORGIAN BAY

SECTION C

PROPOSAL SUBMISSION DOCUMENTS and EVALUATION
THE CORPORATION OF THE TOWNSHIP
OF GEORGIAN BAY

Supply, Implement and Provide Ongoing Support Services with Respect to an
Electronic Document and Records Management System

COMPANY: ____________________________________________

ADDRESS: ____________________________________________
_____________________________________________________
_____________________________________________________

REPRESENTATIVE: _______________________________________

TELEPHONE NO.: _______________________________________

FAX NO.: _____________________________________________

EMAIL ADDRESS: _______________________________________

DATE: ________________________________________________
C. EVALUATION CRITERIA:

C.1 Project Experience

The proponent should demonstrate their relevant experience related to implementing an EDRMS at a municipal level.

C.2 Office Location

It is anticipated that most proponents responding to this RFP will not be located in the Township of Georgian Bay. Proponents are to provide a description of which office or offices the work will be managed from as well as the anticipated fee and disbursement structure for travel to and from any (if required) meetings held at the Township of Georgian Bay offices.

C.3 Team Qualifications and References

Proponents are requested to provide a brief description (no more than one page per person) of the qualifications of key personnel along with their backups. Additional information regarding the key personnel and/or other support staff may be included in appendices to the proposal.

Also requested are reference letters from other municipalities and/or organizations that have implemented their EDRMS.

C.4 Service Expectation

A schedule / timeframe for all aspects of installing, training, deploying, etc., of the program is required as well as detailed information on what the program offers.

C.5 Fees

Pricing shall be outlined and shall include all software, licensing, services, materials, labour and equipment, necessary for implementing the EDRMS.
Evaluation of Proposals

Ratings details will be confidential and will not be released to any of the proponents. The scoring of each submission may be made available to the public by the Township when presented to Township Council.

The evaluation of the proposals shall be based on the factors presented as follows in Table 1.

<table>
<thead>
<tr>
<th>Rating Factors</th>
<th>Weight Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Project Experience</td>
<td>20</td>
</tr>
<tr>
<td>2. Office Location</td>
<td>10</td>
</tr>
<tr>
<td>3. Team Qualifications / References</td>
<td>20</td>
</tr>
<tr>
<td>5. Service Expectations</td>
<td>30</td>
</tr>
<tr>
<td>6. Fees</td>
<td>20</td>
</tr>
<tr>
<td><strong>MAXIMUM TOTAL POINTS</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>