



**THE CORPORATION OF  
THE TOWNSHIP OF  
GEORGIAN BAY**

**REQUEST FOR PROPOSAL  
No. 2021-26**

**Full Service Managed Service Provider**

**Date Issued : Monday, October 4, 2021**

**Request Closes : Thursday, November 4, 2021  
3:00 PM Local Time**

**Location : The Township of Georgian Bay**

**99 Lone Pine Road  
Port Severn, Ontario  
L0K 1S0**



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## 1 INFORMATION TO BIDDERS

### 1.1 BACKGROUND

The Township of Georgian Bay (herein referred to as the Township) 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.

In 2020, to maintain business continuity the Township switched from an on-premises IT solution to a Full-Service Managed Service Provider (MSP) model. Township servers were moved from on-premises to a virtual private cloud with administration, service, support, and maintenance provided by the MSP with our servers hosted through HostedBizz.

The goal of the Township is to secure a long-term full service managed service provider solution partnership to meet the Township's strategic information technology goals and service needs.

### 1.2 SCOPE OF PROPOSALS

The Township is seeking proposals for a 3-to-5-year term for a Managed IT Service Provider to fulfill the role of IT System Administrator and Support. The MSP will work with the Township's Business Systems IT contact to ensure smooth operation of current systems, infrastructure, software, and services as well as make recommendations for the improvement of services, infrastructure, software, services, and information security.

The Managed IT Service provider will:

- Perform initial migration of services, VMs, hardware, applications, infrastructure management, etc. (If required to move services from our current provider – HostedBizz)
- Provide ongoing Tier 1-3 Support Desk to end users relating to Township systems, hardware, services, software, etc.
- Manage user account creation, deletion, and configuration
- Provide ongoing system administration for Township servers, applications, systems, firewalls, network and information systems security, etc.
- Manage Cybersecurity through firewalls, access controls, etc.
- Function as the Township's infrastructure management team to provide consultation and recommendations on required upgrades and projects.

In addition, the Township requests that hourly rates be provided for common additional work that may be required over the duration of the agreement (E.g., new projects including network infrastructure upgrades, server upgrades, provisioning additional servers, etc.) to assist the Township assessing costs of out of scope or new projects regarding information services, infrastructure, and information security as required for the duration of the agreement.



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### 1.3 QUESTIONS & CLARIFICATIONS

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

Questions relating to this request must be:

**Received By :** On or before Thursday, October 14, 2021  
by 4:00 PM

**Contact :** Nathan Fisher, Business Systems and Data  
Technical Assistant

**Email :** [nfisher@gbtownship.ca](mailto:nfisher@gbtownship.ca)

Answers to pertinent questions will be responded to and shared with other Consultants via an addendum to ensure a level playing field for all Consultants. 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 addenda, which will be issued by the Contact and posted on the township's website in accordance with the schedule of events below.

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

### 1.4 SCHEDULE OF EVENTS:

Request for Proposal Release	Monday, October 4, 2021
Deadline for Queries	Thursday, October 14, 2021 4:00PM
Addendum Release (if required)	Thursday, October 21, 2021 3:00PM
Closing Date	Thursday, November 4, 2021 3:00PM
Proposal Opening	Thursday, November 4, 2021 3:05PM
Anticipated Notice of Award* (Subject to Council's Ratification)	Week of November 8th, 2021

### 1.5 SUBMISSION, CLOSING AND GENERAL TERMS AND CONDITIONS

Tender submissions will be accepted at the Township Office (address noted in Section 2.1), digitally through Biddingo for consideration prior to the closing date and time.

The proposal must be submitted using a 2-envelope staged method:

1. Proposal Documents (Used to evaluate project proposal)
2. Price Information (Used to evaluate projects with a score over 80% in stage 1)

Failure to submit price information separately will result in **automatic rejection**.



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### **Emailed submissions are NOT accepted**

All proposal submissions must conform to the terms and conditions set out herein including the attached Schedule A – General Procurement Process (An excerpt from the Procurement Policy By-law 2013-74) Revision of June 2015 SECTION 6. Failure to do so may cause the submission to be rejected.

The Township reserves the right to reject as any tender that in its opinion would not be able to perform the work in a satisfactory manner.

The lowest or any bid will not necessarily be accepted.

To participate in the VIRTUAL public opening please advise prior to noon on the closing date via email to [jbouthillette@gbtownship.ca](mailto:jbouthillette@gbtownship.ca). A Zoom link will be provided.

A tender may be withdrawn at any time prior to the Closing of November 4, 2021 @ 3:00:00 pm.

Subsequent to the opening, however, the number of RFP packages released is public information. It is understood that by completing and submitting a response the Respondent agrees to public release of their name and amount of bid.



## **2 SPECIFICATIONS**

### **2.1 CURRENT TOWNSHIP SERVICES & SYSTEMS**

- The Township Administrative Office is located at 99 Lone Pine Rd, Port Severn, ON, L0K 1S0
- 13 VM servers currently hosted in the cloud within Canada on Tier 3 certified data center with 99.9% uptime guarantee.
  - 2 Active Directory
  - 1 Connection Broker & RD Web
  - 1 RDS Gateway
  - 3 RDS Session Host
  - 1 File & Print Server
  - 5 Application Specific Servers
- Remote Desktop Server (Load Balanced on 3 RDSs) is the current method of staff accessing Township applications.
- 52 Staff Licensed through O365
- 43 Laptops
- Approximately 51 support tickets per month.
- Current Internet Services
  - Administrative Campus (Admin Building, Community Services Building / Library, Fire Hall/Garage)
    - Main: Fiber, 100Mbps Down, 100Mbps Up
    - Supplementary: DSL, 25Mbps Down, 25Mbps Up
    - Buildings connected via 10Gbe
  - Satellite Locations
    - Baxter Ward Community Centre – Point to point connection to administrative campus
    - MacTier Arena – DSL, 6Mbps Down, 800Kbps Up
    - MacTier Shop – DSL, 6Mbps Down, 800Kbps UP
    - MacTier Library – DSL, 6Mbps Down, 800Kbps UP
    - MacTier Fire Hall - DSL, 6Mbps Down, 800Kbps UP
    - Honey Harbour Fire Hall - DSL, 6Mbps Down, 800Kbps UP
    - Honey Harbour Library – Cellular Rocket Hub, DSL, 6Mbps Down, 800Kbps UP
- Current Software
  - Office 365 Suite, Adobe (mix of Pro/DC and Reader), TownSuite ERP, FileHold, StoneOrchard, iCompas, InfoBite, FireHouse, Public Sector Digest applications (Works, Wide, FMW)



### 2.2 Managed Server Provider Requirements

#### 2.2.1 Managed IT Services – Server

- Virtual private cloud solution in a Tier 3 certified data center
- Can be hosted directly with MSP or through MSP Partner
- All servers and data storage must be located within Canada
- Performance metrics and monitoring, and review to ensure servers and services are meeting performance quality needs of the Township.
- Deployment of critical operating system and software patches including service packs
- Scheduling and performing system software/firmware maintenance and upgrades according to best practices.
- Initial installation and ongoing maintenance, and support of server-side operations.
- Service monitoring and availability checks for business-critical services including DNS, DHCP, TS, SQL Server, Exchange, IIS, etc.
- Network infrastructure management
- Network device availability monitoring and notifications.
- Server backup, backup monitoring
- Server maintenance including deletion of temporary files, rebooting of servers as required.
- Enforcement of IT policy management including protection of critical files, file systems, application / network usage, security, applicable legislation, and best practices.
- Management of Server Licenses (e.g., Microsoft Server, SQL, etc.)

#### 2.2.2 Managed IT Services – Client

- Set-up, configuration, maintenance, management, and support of approximately 42 client Windows laptops.
- Set-up and configuration of Windows laptops to access our services for new Township staff as needed.
- Help Desk support for approximately 52 Township employees.
- Management of access control to Township services including applications, devices, files, and printers
- Patch Management to keep systems and software up to date and secure from known vulnerabilities.
- Management of user software licenses (o365)



### 2.2.3 Managed Information Security

- Manage anti-virus and security defenses for servers and endpoints
- Manage firewalls
- Monitoring, detection, notification, and response to suspected system compromise.
- Manage e-mail filtering, spam, virus detection, and Avanan.
- Virus, spyware, and malware detection, and removal for Township servers, laptops, desktops, and other devices
- Participate in annual security audit with Township's Business Systems IT Contact
- Patching, and configuration changes to mitigate known vulnerabilities on Township systems resulting from the annual security audit.
- Provide upgrade recommendations where reasonable mitigation of vulnerabilities through patching and/or configuration of current systems is deemed not adequate.

### 2.2.4 Managed Service Desk & Support

- Customer oriented and approachable support desk staff
- Live phone support
- Remote support
- On-site support
- User friendly ticket & tracking system
- User-friendly application where staff may submit and review outstanding ticket progress and communicate with MSP contacts
- Strong communication on updates of outstanding ticket solution and project progress to keep Township employees updated and informed
- Response time monitoring and review to ensure that the Township's support needs are being met

#### 2.2.4.1 Service Level Agreement Parameters

- Provide End-User IT support during regular business hours. The Township's regular business hours are from 7:30am – 4:30pm EST.
- 15-minute initial response guarantee to critical issues affecting more than 3 people.





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- 2-Hour initial response guarantee to service requests received via phone, e-mail, ticket, or voicemail.
- 4-hour onsite response guarantee for site core network hardware issues which prevent users from being able to complete work.
- Scheduled response to non-critical problems.

### **2.2.4.2 Guarantee of Capacity to Meet Minimum Service Level**

The Township want to ensure consistent, and dependable service for day-to-day business operations. We request that the proponent back their minimum service level guarantee with compensation for failure to meet the agreed upon guaranteed minimum service level.

For a given month, each instance that the guaranteed minimum service levels are not met, a penalty of 1% of monthly service desk support costs, up to a maximum of 25% of monthly service desk support costs will be refunded to the Township.

### **2.2.5 Agent of the Township**

- The MSP will act as an agent for the Township to address and resolve hardware, systems, and software issues with the pertinent vendors.
- The MSP will act as an agent to assist in sourcing, evaluating, and recommending hardware, systems, and software solutions.
- Any third-party service for software, systems, and hardware needs to be billed direct from the vendor to the Township.

### **2.2.6 Network and connectivity**

- The MSP will act as the agent for the Township to address and resolve network and connectivity issues including internet service connectivity with the Township's internet service provider.



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### 2.2.7 Reporting Requirements

- Monthly Reporting
  - Participation in Comprehensive IT Review and Strategic IT Road Map monthly reporting
  - Provide reporting on open and closed ticketed items.
  - Activities performed related to The Township's IT network during the month, including actual time spent by resources and charge-out rates if applicable.
  - Number and description of service calls taken, including average response times to respond to and resolve call requests/issues.
  - Detailed accounting of issues requiring escalation, including name of the initial client, description, action taken, and timeline for resolution.
- Quarterly Reporting
  - Outstanding issues, capacity, strategic IT planning sessions that may include optimizations to data backup, firewall changes, storage array configuration, desktop management, application deployments, and server/network hardware, etc.
  - Statistics and commentary detailing the health and performance of the network and Township systems (e.g., available disk space, network speed, CPU utilization, slow switches, etc.)
  - List of required/recommended work (e.g., expiring licenses, end of life software upgrades, server upgrades, firmware upgrades, security hardening, vulnerability mitigation, etc.)
  - These meetings may be done onsite or via audio/video communications platform (e.g., Teams, Zoom, etc.)
- Annual Reporting
  - Annual forecast on IT hardware upgrades required for the next 3-5 years.
  - Annual Cybersecurity report to show implementation progress of recommendations that arise from the annual security assessment.

### 2.2.8 Professional Services

The Township of Georgian Bay's goal is to provide smooth transitions in all projects using appropriate project controls, tools, and appropriate resources. Project Management outside the scope of managed services is optional to the discretion of the Township. The Managed service provider is often in a better position to propose and deliver IT projects due to their internal knowledge of hardware, systems, infrastructure, and applications.



### 2.2.8.1 Migration Management

A critical element of this proposal is the ability of the MSP to demonstrate their ability to fully execute the project in a coordinated and timely manner.

The Township is eager to get this project completed and would like to evaluate all proposals and award this project for efficient and effective completion. Upon award and contract sign-off the Contractor is expected to begin the project kick-off, assessment, and required planning work immediately.

It is expected that the contractor will work efficiently and monitor progress with a well-defined project schedule that will deliver the complete project scope as outlined in this RFP.

The proponent will define milestone timelines to meet the target completion date of March 1st, 2022.

The Proponent must prepare and include with their submission a detailed project plan (GANTT) that outlines all proposed timelines, responsibilities, tasks, and any Township of Georgian Bay staffing resource requirements for this project. Items to include but not limited to

1. Dates and responsibilities for the coordination of tasks relative to pre-migration, migration, and post-migration.
2. Detailing and documenting of Client systems.
3. Services ordered, including any required onsite equipment.
4. Equipment to be received (if required)
5. Network readiness assessment (if required).
6. Network and services coordination.
7. Migration design and configuration.
8. On-site installation of any required hardware and/or station equipment.
9. Pilot testing and receive feedback.
10. Migration from old provider to new provider.
11. Final testing and acceptance.



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### 2.2.8.2 Project Management

The successful proponent will have a strong ability to assist the Township in implementing future projects with their internal knowledge of software, hardware, systems, and infrastructure. At the Township's discretion, the MSP may be given the opportunity to implement future projects which are out of scope.

As part of these projects the MSP will work with the Township's Business Systems IT contact to:

- determine solution requirements
- develop project milestones
- set project timelines
- develop a project plan (e.g., Gantt chart) to track each project
- assess progress toward meeting set project timelines
- re-evaluate timelines and communicate changes to project timelines due to unforeseen circumstances
- follow best practices for change management to ensure smooth transitions to new systems, hardware, infrastructure, and applications.
- perform a post-project review to assess the efficiency and effectiveness of a project's implementation process to determine areas for improvement on future projects.

### 3 OTHER GENERAL INCLUSIONS

- There is NO bid Deposit required on this submission.
- To ensure proper execution of the work, the successful consultant will be required to execute a performance guarantee of **\$2,000** in the form of a certified cheque, irrevocable letter of credit, or bond.



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**4 PROPOSAL SUBMISSION DOCUMENTS**

**Full Service Managed Service Provider**

**COMPANY NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
**(Including Branch if applicable)** \_\_\_\_\_

**TELEPHONE No:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**AUTHORIZED NAME (Print):** \_\_\_\_\_

**AUTHORIZED POSITION::** \_\_\_\_\_

**AUTHORIZED SIGNATURE**

- I have the Authority to bind the corporation
- I understand that I have submitted a bid using legal bidding practices
- I understand that a Performance Guarantee of \$2,000 will be required if I am successful
- I understand that I will need to provide an Insurance certificate naming the Township as additionally insured for \$2 million general liability policy and a WSIB Clearance Certificate.
- I have attached a separate sheet with relevant qualifications and experience

**NAME AND CONTACT INFO OF PROJECT LEAD (Manager)** \_\_\_\_\_

**TELEPHONE No:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_



## **5 EVALUATION CRITERIA**

### **STAGE 1**

#### **QUALIFICATIONS AND EXPERIENCE (45%)**

The proponent's demonstration of:

- experience on similar engagements, experience of key personnel, and level of staff certification and expertise;
- appropriate capacity with an adequately staffed team to take on the Township's managed IT services;
- how features of their services give them a competitive advantage
- 3 references;

Preference will be given to managed service providers who demonstrate experience in working with municipalities, and who provide at least one municipal reference.

#### **CLARITY AND COMPLETENESS OF PROPOSAL (35%)**

The ease of understanding will be evaluated. The proponent should:

- illustrate an in depth understanding of the Township's requirements;
- demonstrate a how the deliverables and requirements will be met with a high degree of effectiveness and efficiency;

The ability to directly tie the proposal back to the RFP's requirements will be ranked more favourably.

#### **PROPOSED WORK PLAN AND TIMELINES (20%)**

The evaluation team will consider the general approach and methodology that the consultant would take in performing the services. The proponent should:

- include how the proponent will complete the scope of the services (methodology);
- show how they will manage the services and accomplish the required objectives;
- include a description of the standards to be met and evaluated in the deliverables;
- provide a schedule of activities of the proposed period of the engagement.

### **STAGE 2**

Proposals which score over 80% in Stage 1 will have their pricing submission considered by the evaluation team.

#### **FEES AND DISBURSEMENTS (100%)**

The total cost (on the Proposal Submission Document) shall be inclusive, including but not limited to, fees, mileage, disbursement, and travel time. It is acknowledged that some items will be subject to HST, however HST is not to be shown.



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### **SCHEDULE "A" – GENERAL PROCUREMENT PROCESS (An excerpt from the Procurement Policy By-law 2013-74) Revision of June 2015**

#### **GENERAL PROCUREMENT PROCESS**

In all cases, the procuring Department Head and any other affected department shall coordinate the procurements.

The Department Head will ensure:

- a) completeness of documentation;
- b) advertisements are arranged;
- c) bid closing and opening date, time and location have been booked;
- d) bid opening subcommittee has been appointed; and
- e) vendor contact information is appropriate .

#### 1) Procurement Documentation Preparation

The procurement document will consist of a number of sections. When considered in its entirety, the document must contain the appropriate information so that staff evaluating the bids can determine that:

- a) the bidder understands the full scope of the procurement for which bids have been invited, and
- b) the bidder is capable and willing to perform all of the required work or provide all of the required goods and/or services; and
- c) the bidder is capable and willing to enter into a legal agreement with the Township for the provision of the required goods and/or services; and
- d) the bidder offers, when required, financial guarantees that a formal agreement will be executed (signed). This may require a bid deposit. When a bid deposit is required, the Department Head shall determine the amount of the bid deposit which may be 10 per cent of the estimated value of the work prior to bidding, an amount equal to 10 per cent of the bid submitted or such other amount as the Department Head deems appropriate .; and
- e) the bidder offers, when required, financial guarantees to ensure execution and performance of the contract. Means may include one or more of, but are not limited to, financial bonds or other forms of security deposits, provisions for liquidated damages, progress payments and holdbacks.
- f) the bidder understands that moral, ethical and legal bidding practices must be adhered to in accordance with the municipality's and/or Provincial standards.



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### 2) Contents of the Procurement Document

Procurement documents will contain at least the following:

- a) A cover sheet indicating the bid number, the name of the procurement, the closing date and time, and issuer or contact person within the issuing department.
- b) Information to bidders containing non-technical information that advises the bidders of the general terms and conditions that apply to the tender of goods and/or services.
- c) Specifications - (used in preparation of Requests for Quotation - RFQ) that provide details to describe accurately and precisely the nature, scope and extent of the goods and/or services required . Specifications may not be structured to exclude certain vendors or manufacturers unless there is documented evidence to warrant exclusion;

OR

Scope of Work- (used in preparation of Requests for Proposal - RFP) that defines the objectives of the project and the scope of the services required .

- d) Bid Deposit - information advising if a bid deposit is required to ensure that a formal agreement is entered into.
- e) Performance Guarantee- to ensure proper execution of the work, a performance guarantee in the form of certified cheque, irrevocable letter of credit, or bond (performance, labour and/or materials) may be required. All requirements must be clearly outlined in the information to bidders.
- f) Bidder Conduct - confirmation by the bidder that they have submitted a bid using legal bidding practices (included in contract).
- g) Insurance - Liability Insurance Certificate {Township of Georgian Bay listed as "additional insured") with a minimum of the criteria listed below. This should be used as a guide but each circumstance should be assessed individually and consultation provided by the Township's insurer from time to time.

\$2 million general liability policy  
\$2 million automobile liability policy  
\$2 million homeowners (e.g. for rental of facilities)  
\$5 million general liability and automobile liability policies - for contracts done for most Public Works Department projects  
\$2 million professional errors and omissions liability Builder Risk - the amount of the project cost

Bid documents must clearly indicate insurance requirements to be provided by the successful bidder.





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- h) Form of Tender - when properly completed and signed, this is a legal offer by the bidder to carry out the tendered work. The Tender Form should include an acknowledgment from the bidder that he/she has reviewed and understands all of the tender documents, and that he/she is prepared and capable of fulfilling the proposed requirements for the supply of goods and/or services. Proper and clear identification of the bidder as well as clear bid prices must appear on the completed Tender Form.
- i) Evaluation Criteria - dependent on the method of procurement, evaluation criteria may be included in addition to identifying that price will also be considered.

### 3) Procurement Packages

Upon the request of a prospective bidder, the Department Head or designate shall supply one copy of the following:

- a) Cover Sheet;
- b) Procurement Document; and
- c) Bid Form.

### 4) Advertising

- a) The following advertising procedures shall apply to all procurements, except procurements by direct purchase and in some circumstances, at the discretion of the department head, request for quote.
- b) Where only prequalified suppliers will be eligible to participate in a procurement process, notice of the request for quotation, tender or proposal shall be given by way of notice in the Township's standard form and forwarded to the selected suppliers by regular mail, email, fax, courier, pick up at front reception or such other methods as may ensure notification and integrity of the process.
- c) Where a procurement process will be open to all who wish to participate, notice shall be given by the following methods:
  - i) publication in a trade journal or other publication likely to be read by the group of potential suppliers; and/or
  - ii) publication on the Township's website.

Department heads shall give consideration to the value added benefits of utilizing online procurement portals such as MERX, Biddingo, etc.

- d) Procurements advertised shall include:
  - i) identifying the bid;
  - ii) a description of the goods and/or services sought;
  - iii) the name and office address of the designated municipal contact person;
  - iv) date and time of closing; and
  - v) Where the procurement documents may be obtained.



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- f) The Township will make best efforts to maintain a list of annually reoccurring purchases, and when required, on the municipal website in an effort to advise potential suppliers.

### 5) Amendments/Revisions to Procurement Documents

Addenda will be issued under the following circumstances:

- a) Interpretation of tender documents as a result of queries from prospective bidders.
- b) Revisions, deletions, additions or substitutions of any portion of the procurement document.

The Department Head or designate shall approve the issuance of any addenda.  
Notification of Addenda to Prospective Bidders

A copy of all addenda shall be sent by registered mail, or by fax confirmed by a telephone call or by electronic correspondence when appropriate to each prospective bidder who obtained procurement documents. Alternatively, the addendum may be posted on the Township website. All remaining procurement documents not yet distributed shall have the addenda appended.

Where an addendum must be issued within two days of the specified closing date, the closing date may be extended to allow four working days between the issuance of the addendum and the revised closing date. This extension is optional and shall be used as required.

### Closing Date Extension or Cancellation

When it becomes necessary to extend the closing date or to cancel the tender, all prospective bidders who received procurement documents shall be notified of the cancellation using the method for notification of addenda detailed above.

When a tender is cancelled, no bid will be accepted. All bids shall be returned unopened to the bidders by hand or by registered mail with a covering letter signed by the Department Head or designate.

### 6) Submission Requirements

All bids shall be received at the Township Municipal Office in the following form:

- a) Initialed by receiving party, time and date stamped;
- b) Receipt of the bid shall be recorded on a Bid Recording Form and safeguarded until after the bid closing time.
- c) The bid must be submitted in a sealed envelope clearly marked with the bid #;
- d) The correct bid form, if supplied by the Township, must be used;
- e) The bid must be legible, completed in a non-erasable ink and all items must be bid unless the tender specifically permits otherwise;



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- f) Adjustments by telephone, letter, facsimile, or electronic correspondence to a bid already submitted will not be considered. A bidder desiring to make adjustments to a bid must withdraw the bid and resubmit.

Any bids received after the closing time and date will not be accepted and will be returned unopened to the submitting vendor;

If any of the procurement requirements have not been met, the bid shall be considered to be an "Improper Bid" and dealt with as set out in Schedule "C" entitled "Acceptance or Rejection of Improper Bids."

### 7) Withdrawal of Bids

#### a) Prior to Opening

The withdrawal shall be allowed if the request is made before closing time for the bid. The withdrawal request must be directed to the noted Department Head in writing on company letterhead and signed by a principal of the company. Telephone correspondence shall not be considered. Bids confirmed as withdrawn prior to being deposited with the Township shall be returned unopened to the bidder.

The withdrawal of a bid does not disqualify a bidder from submitting another bid for the proposed procurement .

Withdrawal requests received after the bid closing time will not be allowed. The bidder shall be informed that the withdrawal request arrived too late for consideration. However, when the bids are read out at the bid opening, the bidder may then proceed in accordance with the following section entitled "During the Opening."

#### b) During the Opening

During a bid opening a bidder may withdraw a bid prior to the opening of the bids. The bidder shall attest in writing to her/his identity and state the bid he/she desires to withdraw. The Department Head shall attach the withdrawal to the applicable bid and read out the bidder's name and announce that the bid has been withdrawn in accordance with established procedure. The Department Head shall not open the withdrawn bid. Bids withdrawn under this procedure shall not be reinstated.

### 8) Opening of Quotations, Proposals and Tenders

- a) The bids submitted shall be publicly opened by a subcommittee consisting of:
- i) Head of issuing department;
  - ii) Municipal Treasurer or designate; and
  - iii) One staff member.



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- b) The Head of the issuing department shall check the Bid Recording Form with the number of bids to be opened to ensure that all bids received are accounted for.

If a discrepancy occurs, the bid opening proceeding shall be delayed until all bids have been accounted for.

- c) Each bid will be opened one at a time, read aloud and analyzed for compliance to determine that:
- i) all procurement requirements have been met as stated in the procurement documents and this policy; and
  - ii) all unit prices have been correctly extended and totalled .
- Bids which do not conform to the procurement requirements or which require mathematical corrections shall be deemed "Improper Bids" and shall be dealt with as set out in Schedule "C" entitled, "Acceptance or Rejection of Improper Bids."
- d) A written report outlining the bids received and the recommended successful bid will be presented to Council for approval. (Consent Agenda)

### 9) One or No Acceptable Response Received

#### No Acceptable Bids Received

- a) Where the bids received in a procurement process exceed budget, are not responsive to the requirement, or do not represent fair value, a revised solicitation may be issued in an effort to obtain an acceptable response unless Section (8) above applies.
- b) The applicable Department Head and the Treasurer jointly may waive the need for a revised bid solicitation and enter into negotiations with the lowest responsive bidder, or the highest responsive bidder for a revenue driven bid selection emanating from a bid solicitation under the following circumstances:
- i) the total cost of the lowest responsive bid is in excess of the funds budgeted by Council for the project or the highest responsive bid revenue is less than that made; and
  - ii) the Department Head and the Treasurer agree that the changes required to achieve an acceptable bid will not change the general nature of the requirement described in the bid solicitation.
- c) The Township has the right to cease negotiations and reject any offer at any time.

#### Only One Bid Received

In the event that only one bid is received in a procurement process, the Department Head may:



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- d) Return the unopened bid to the bidder informing the bidder that the Township may be recalling the procurement at a later date; or
- e) Cause the bid to be opened and evaluated in accordance to this policy. If the bid is found not to be acceptable the procedures set out in Section (8) may be followed.

### Two Equal Bids Received

- f) The Township will offer an opportunity for suppliers to re-submit. Should a tie persist the equal bidders shall draw straws.

### 10) Awarding Bid

- a) The successful bid shall be awarded by resolution at a Council meeting . Once the necessary approvals have been received, the Department Head may use the bid form as the binding contract for the supply of the tendered goods and/or services.

The Head of the issuing department shall in writing notify each of the unsuccessful bidders of the awarded successful bid and to thank them for their participation .

The Department Head shall obtain the following documents:

- Goods/Materials
  - \_ Material Safety Data Sheets for any WHMIS controlled products .
- Services
  - \_ Signed Contractor Health & Safety Responsibility Agreement
  - \_ WSIB Clearance Certificate (no more than 60 days old)
  - \_ Contractor's accident history (for one year)
  - \_ Liability Insurance Certificate(s) (Township of Georgian Bay listed as "additional insured".
  - \_ Applicable licences and certificates of contractor's employees.

The Department Head shall be responsible for providing the following documents when securing the contract for services:

- Health and Safety Rules and Regulations; and
  - Equipment Lockout Procedures.
- b) The opportunity for public viewing of competitive bids or proposal documents and bidders list disclosure is as follows:
    - i) Winning bids and proposals become public information and may be disclosed upon a request by any member of the public. Bidders are informed in advance that if their bid is successful, it will become a public document.



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- ii) Where a tender opening is public, summary bid prices shall be read out and a written summary of this information will be available for public viewing following the tender opening and shall also be provided on request at any time. Individual bid pricing schedules may also be available for public viewing following the opening for a limited period of time if requested by any member of the public present at the opening, including any involved bidder.
- iii) Proposal openings may not be public, however the selection committee's notes, score sheets, and the winning proposal can be viewed by any member of the public upon request. Proponents are informed in advance that their proposals become a public document if they are successful.

### 11) Disposition of Deposit Cheques

Following the recommendation to award the contract to a specific bidder, bid deposits of the bidders shall be returned to the applicable bidders to the last known place of business. The bid deposit cheque of the successful bidder, as well as the bid cheque from the second choice bidder, shall be held until the contract is executed.

### 12) Successful Bidder Does Not Finalize Contract

If the contract has been awarded and the successful bidder fails to sign the contract or provide the necessary security within the time specified in the procurement documents, the Department Head may grant additional time to fulfill the necessary requirements or may recommend the following :

- a) that the contract shall be awarded to the next lowest bidder; or
- b) that the contract be cancelled.

In either case, the tender bid deposit of the successful bidder shall be forfeited and forwarded to the Treasury Department for deposit.

### 13) Confirmation of Contract

Executed contract or letter of award shall confirm all tenders, whichever is most appropriate . All payments will be made after authorization is received via stamped invoice initialled by the Department Head and/or Treasurer.

### 14) Custody of Documents

The issuing department shall be responsible for the safeguarding of original purchasing and contract documentation for the procurement of goods and services.

### OTHER

#### 1) Access to Information



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

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

- a) prejudice significantly the competitive position or interfere significantly with the contractual or other negotiations of a person, group of persons, or organizations.
- b) result in similar information no longer being supplied to the Township where it is in the public interest that similar information continues to be so supplied.
- c) result in undue loss or gain to any person, group, committee or financial institution or agency; or
- d) result in information whose disclosure could reasonably be expected to be injurious to the financial and other interests of the Township.



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### **SCHEDULE "C" - ACCEPTANCE OR REJECTION OF IMPROPER BIDS (An excerpt from the Procurement Policy By-law 2013-74) Revision of June 2015**

Extreme care shall be exercised to ensure that improper bids are handled in a manner, which is fair to the other bidders as well as the public.

The decision as to whether an improper bid shall be accepted or rejected shall be based upon the following considerations:

- i) is the intention of the bidder clear?
- ii) has the bidder made a conscientious attempt to comply with the submission requirements?

The following are guidelines only and are intended to illustrate some of the discretion allowed. The Department Head will review each case.

	<b>IRREGULARITY</b>	<b>RESPONSE</b>
1	Late Bids	Automatic rejection
2	Unsealed envelopes	Automatic rejection
3	Not completed in a non-erasable medium	Automatic rejection
4	Incomplete bids – part bids – all items no bids	Automatic rejection except where the tender form clearly states that an award may be made for individual items or where in the opinion of the Department Head, the incomplete nature is trivial or insignificant.
5	Qualified bids – qualified or restricted by an attached statement	Automatic rejection except where the tender change is requested by the Township or where in the opinion of the Department Head, the incomplete nature is trivial or insignificant.
6	Financial security not submitted or insufficient	Automatic rejection
7	Bid not properly signed	Automatic rejection





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8	Mathematic errors	<p>a) If the amount tendered for a unit price item does not agree with the extension of the estimated quantity and the tendered unit price, or if the extension has not been made, the unit price shall govern and the total price shall be corrected accordingly.</p> <p>b) If both the unit price and the total price are left blank, the bid will be rejected as incomplete.</p> <p>c) If the total price is left blank for a lump sum item, the bid will be rejected as incomplete.</p> <p>d) If the bid contains an error in addition and/or subtraction in the approved procurement documentation format requested, the error shall be corrected and the corrected total contract price shall govern.</p> <p>e) Bids containing prices which appear to be so unbalanced as to likely affect the interests of the Township adversely, will be clarified, and may be rejected.</p>
9	Agreement to bond insufficient or not submitted	Automatic rejection
10	Bids received on documents other than those provided by the Township	Automatic rejection unless, in the opinion of the Department Head, the matter is trivial or insignificant.
11	Illegible or obscure bids	Automatic rejection
12	Bids containing additions, erasures, alterations, errors or irregularities of any kind	May be accepted, as long as the bidder initials the changes within the time limit given.
13	Failure to include signature of the person authorized to bind the bidder in the space provided in the procurement document	Automatic rejection
14	Conditions placed by the bidder on the Tender Form	Automatic rejection