



**THE CORPORATION OF THE TOWNSHIP OF MUSKOKA  
LAKES**

**REQUEST FOR PROPOSALS (RFP)**

**FOR**

**THE PROVISION OF  
CONSULTING SERVICES FOR THE REVIEW OF THE  
TOWNSHIP'S STRATEGIC PLAN**

**Reference #: P-2024-16**

**RFP Issue Date:** December 22, 2023

**RFP Closing Date and Time:** Submissions must be received by 1:00 p.m. local time on Monday, January 29, 2023

**RFP Closing Location:** Clerk's Department  
Township of Muskoka Lakes Municipal  
Office 1 Bailey Street  
Port Carling, Ontario P0B 1J0

**Contact:** Derrick Hammond, Chief  
Administrative Officer

**Notice:** Late Submissions Will Not Be Accepted  
The lowest or any bid not necessarily accepted



## 1. COMMUNITY OVERVIEW

The Township of Muskoka Lakes is located in the heart of the District of Muskoka, situated at the southern tip of the Canadian Shield. About two million years ago, this section of the Shield was covered by a series of glaciers, which left behind the numerous lakes that define the municipality today. The Township encompasses a large geographic area around Lakes Muskoka, Rosseau and Joseph. Within the approximately 780 square kilometers within the Township's jurisdiction, lie over 80 lakes and rivers, numerous wetland complexes, bedrock outcrops, islands, all set amongst a mix of vegetation types and natural heritage areas. The natural beauty of the shorelines and the abundance of wildlife make Muskoka Lakes a world renowned and preeminent tourism and recreational living destination.

The Township's population consists of approximately 7,652 permanent residents (2021 Census) and over 28,000 second home residents. While the permanent residency is predominantly located in six un-serviced communities, two serviced urban centres, and the rural area, the second home residents reside primarily in the waterfront area. With the majority of the more highly assessed properties located in the waterfront area, at nearly \$11 billion in assessed property value, Muskoka Lakes has the largest assessment base in the District of Muskoka.

Given the high quality living opportunities in the waterfront area, over the last 20 years, the Township has witnessed unprecedented growth along the shores of its lakes. Although much of this is individual residential lot development on Lakes Joseph, Rosseau and Muskoka, larger scale proposals, development on medium and small lakes and commercial development also play an important factor. According to the Municipal Property Assessment Corporation, the Township issued the most residential building permits in the District of Muskoka. In 2022, the value totaled \$205,088,479.

With the rise in the amount and extent of waterfront development, there has been a corresponding community concern respecting its impact of the natural environment and the character of this area. A review and update of the Township's Official Plan has recently been completed. Community consultation has been undertaken to create a vision and guiding principles for development. As significant development may also be on the horizon for Minett, a separate review to examine and potentially reduce those development rights has also been completed.

From an economic perspective, supporting permanent and second home residents as well as tourists creates the largest share of employment in Muskoka Lakes. Key employment sectors include the service (business services 17%, finance and real estate 5%, Health care and social services 8%, educational services 5%, and other services 22%) retail (14%) and construction (18%) industries. A number of the Township's residents commute to work in the nearby Towns of Bracebridge, Gravenhurst and Huntsville. Given the predominance of the service, retail and construction industries in the Township, a challenge for the community is to protect our natural legacy and continue to diversify and grow the local economy in the context of a changing world economy.



In addition to maintaining a road system of 380 km of local and rural roads in the Canadian Shield, the Township owns and operates ten fire stations, twelve community centres, two arenas, and multiple parks, trails, picnic areas, playgrounds, municipal docks, lake access points and launch ramps, beaches, spread throughout the municipality. To assist with the prioritization of the maintenance, repair, and in some cases the replacement, of this infrastructure, the Township has currently recently completed an asset management plan. In addition, the Township has completed a Fire, Parks and Recreation, as well as Transportation Master Plans. All of these documents are intended to inform a Capital Level of Service Study in 2024. This study will inform a long term sustainable financial plan for capital assets.

To meet the increasing service expectations of the Township’s permanent and seasonal residents, the Township is desirous of innovation and continuously improving its business and communication practices.

Township Council Policy C-GG-01 requires that Council document and adopt a Strategic Plan which incorporates a clear Vision, Mission and Commitment statement and that the document be reviewed annually. This policy is based on the notion that strategic plans require ongoing monitoring, reporting and periodic re-focusing to address circumstances that are changing. The current Strategic Plan has a time horizon of 2024. With the election of Council in late 2022, to ensure that its components are still valid, consideration of a review and update to the Township’s Strategic Plan is warranted.

2. **PROJECT INTRODUCTION & BACKGROUND**

On January 13, 2021, Township Council approved a [Strategic Plan](#) for the 2021-2024 period. The Plan contains a Vision, Mission and Core Values which are centred on four strategic goals or pillars. These pillars contain one or a series of related objectives.

Strategic Goal:	Objectives:
Preserve and Protect the Natural and Cultural Environment	5
Strengthen and Diversify Muskoka Lakes’ Economy	3
Enhance and Sustain Public Services and Infrastructure	4
Strengthen Key Relationships	3
Total:	15

For the most part, these objectives have now been [fulfilled](#), as projects have been completed or are in process.

The Plan has served, and continues to serve, as the guiding document for the Township to create priorities for Council on annual basis since its adoption in 2020. In addition, the plan has been used to guide Staff’s reports and recommendations to Council in policy, procedures and/or operational matters.

The Township is seeking to review the Strategic Plan and related [implementation plan](#) by gathering input from Council, staff and the public and undertaking an examination of critical issues facing the community. The goal will be to update the Plan to ensure that current and



future Councils can continue to use the Plan to define strategic priorities to be addressed during Council-terms and on an annual workplan basis.

The Township of Muskoka Lakes is seeking the services of a qualified consulting team with extensive experience in strategic planning; public consultation; and project facilitation to undertake a review of the 2024-28 Strategic Plan. The selected consultants will be working closely with Township Council and members of the Township's Strategic Leadership Team.

### 3. **DEFINITIONS**

<b>Township:</b>	Refers to the Township of Muskoka Lakes
<b>Respondent:</b>	Refers to any eligible entity providing a Proposal.
<b>Successful Respondent:</b>	Refers, in the event of an award, to the selected Respondent.
<b>Consultant:</b>	Refers, in the event of an award, to the selected Respondent.
<b>RFP:</b>	Refers to Request for Proposal

### 4. **PROJECT OBJECTIVES & FOCUS**

4.1. The selected consultants will work with Township Council, staff and the community to undertake a review of the current Strategic Plan which has long-range components (e.g. vision, mission, values, strategic objectives), and medium/short term components (e.g. goals with specific action plans). Specific questions to be answered include:

4.1.1. Does the vision statement need to be changed?

4.1.2. Are the four Strategic Priority Areas/pillars appropriate Strategic Objectives? Should there be fewer? others?

4.1.3. How can the plan be improved:

4.1.3.1. to manage, evaluate and make recommendations for "one-off" projects or initiatives that are not identified through this process, for example those that may be identified by a member of Council talking to constituents or which appears as an opportunity;

4.1.3.2. to recognize, provide guidance and integrate with the core operations of many of the departments (i.e. road maintenance, snow removal, processing of planning applications, etc); and many of the statutory duties of municipal government;

4.1.3.3. to integrate with the Township's governance model; and

- 4.1.3.4. to drive the Township's business and business planning.
- 4.1.4. How can goals and specific initiatives be defined and set out in a new plan document?
- 4.1.5. How can this plan continue to be the umbrella document for all other municipal planning documents and/or linked to other Corporate Plans?
- 4.1.6. How can plan success be monitored and measured?
- 4.2. The objectives, priorities and action plans established in the Strategic Plan will be used by staff to prepare their annual department budgets and must:
- be SMART (specific, measurable, achievable, relevant and time framed);
  - be marketable to residents and the outside world;
  - be rooted in today's (and tomorrow's) reality; and,
  - recognize trends and emerging realities.
- 4.3. Performance measures must also be a feature of the Plan to enable Council and staff to annually monitor the Plan's implementation. The Final Report is expected to include a suggested format for a report card to be issued on a periodic basis.
- 4.4. The Township understands that there are a variety of models and approaches that can be used to develop a comprehensive Strategic Plan. Respondents are required to include in their proposal recommended methodology to meet the project deliverables within the scope and constraints provided.
- 4.5. The review of background information will be essential to the community in order to develop achievable and appropriate priorities.

## **5. SCOPE AND CONSTRAINTS**

- 5.1. The selected consultants are required to ensure that their submission address the following:
- 5.1.1. Development of a work/action plan outlining how the following steps/requirements will be met.
- 5.1.2. Completion of a needs assessment/environmental scan – reviewing existing strategic plan, Master Plans, strategies and other plans/documents pertinent to the update of the strategic plan. Recognition of the Township's unique service delivery model to its primary and second homeowners, and identification of related community issues, trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats. Integration of climate change and Indigenous reconciliation, as well as other considerations.

- 5.1.3 A series of workshops with Council and senior staff, including an orientation on strategic planning, a review of the existing Strategic Plan (likes and dislikes), a visioning session, in which goals and objectives etc. are confirmed, as well as a session on their fine tuning.
- 5.1.4 Project Coordination to keep the project on schedule and keep identified stakeholders apprised of the process. Planning, coordinating, and taking minutes of all meetings, including community/employee consultation sessions and meetings with Council and Staff. This can be in conjunction with assigned staff.
- 5.1.5 Organize and facilitate internal (staff) and external (public) meetings to disseminate and gather information relevant to the process. The Township will be responsible for providing meeting facilities, as required.
- 5.1.6 Development of a communication/consultation strategy to advertise and inform both the internal and external meetings of the project. The communication strategy shall identify the best means of communicating with staff, as well as the public. As it relates to the latter, how to best target groups. Through the consultation process, the ideas, opinions, visions, values, and projects will be gathered, summarized and presented in a matrix format for review under the broad headings of economic, social, environmental, and infrastructure to be considered by staff and Council. For the purposes of making the community strategic plan as accurate, inclusive and well-rounded as possible, Proponents must demonstrate how they plan on engaging all aspects of our community (First Nations, primary and second homeowners, neighbouring communities, Clubs/Organizations/Not-for-Profits, and other Government agencies). Process and meeting facilitation, assisting discussion and decision making and ensuring that conversations are forward-looking, action oriented and move the participants towards creating a shared future.
- 5.1.7 Plan documentation, including development of an interim and final report for the project, including executive summary. The plan should build on current successful initiatives across all departments.
- 5.2. Respondents are encouraged to develop multi-disciplinary teams to undertake this project.
- 5.3. The Proponents are not limited by the steps/tasks as outlined above. Proposals may provide additional or combine steps/tasks as part of the Proponent's response.

## **6. PROJECT DELIVERABLES**

- 6.1. The consultant will be responsible for providing expert advice throughout the project and for the following deliverables (note that proponents are not limited by the deliverables and may wish to expand on them):

- |        |   |   |
|--------|---|---|
| 6.1.1  | Project Coordination                          | including regular meetings and status reports to keep the project on schedule and keep identified stakeholders apprised of the process;   |
| 6.1.2. | Orientation of Participants                   | to the process, the components of strategic planning and background community information;  |
| 6.1.3. | Community/<br>Stakeholder Input               | defining a communications plan and consultation strategy for approval by Council; gathering of stakeholder information and input; using appropriate methods of communication and engagement;  |
| 6.1.4. | Needs Assessment<br>and Environmental<br>Scan | reviewing existing plans and background information pertinent to the comprehensive strategic plan, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats;   |
| 6.1.5. | Process and<br>Meeting<br>Facilitation        | leading and facilitating discussion; ensuring that conversations are forward-looking; action oriented and move the participants towards creating a shared future with established and clear priorities; and   |
| 6.1.6. | Plan Documentation                            | including creation of an updated, priority-oriented strategic plan containing a Strategic Vision, Mission and Values, that illustrates how to transform conceptual goals of the visioning process into realistic, achievable targets which encompass all Township departments. As a strategic plan is a “living document” and should undergo periodic review and adjustments to reflect progress toward achievement of goals. For this reason, flexibility should be an important aspect of the Plan. |
- An Implementation Plan over the life of the Strategic Plan that encapsulates where the municipality and stakeholders need to go in a manner that is sensitive to our residents’ quality of life and quality of place. The Implementation Plan must identify broad indicators for measuring outcomes and progress towards the goals and objectives of the Strategic Plan.



The final product should serve as a way to organize and prioritize Township initiatives and resources to achieve specific goals within a specific time period and align with annual work/business plans and budgets.

The consultants will be expected to support the presentation of the final document to Council.

7. **REPORTING**

The Consultant will be required to provide electronic copies of all draft and final reports in Microsoft Office and PDF files on a memory stick or through any agreed upon electronic transfer. Any materials used for presentations, consultations or open houses in both hard copy and electronic format as required. In accordance with Section 44. All documentation must be Accessibility for Ontarians with Disabilities Act compliant.

8. **RESOURCES**

- 8.1. The Township’s Administration staff will assist with logistics, setting up of meetings, communications with committee/public utilizing existing contact databases and social media channels, etc. Existing plans and documents to be utilized for the environmental scan will be provided in hard copy or electronically.
- 8.2. In most cases, public input sessions will be held in Municipal facilities. Costs for meeting venues are NOT the responsibility of the Consultants.

9. **TIMING OF THE PROJECT**

9.1. The following is the timeline for the project:

<b><u>Activity/Milestone</u></b>	<b><u>Associated Due Date</u></b>
Request for Proposal Issued	December 22, 2023
Proposal Closing	January 29, 2024
Consultant interviews, if required	February 1 & 2, 2024
Assignment/Award	February 14, 2024
Project Initiation	February 22, 2024
Final Plan and Report	July 17, 2024

## 10. CONTENT OF PROPOSALS

- 10.1. The proposal should include the Respondent's interpretation of the requirements of the project, together with a description of the approach planned to facilitate carrying out the terms of reference, schedule of tasks and decision points. In addition, the proposal should include:
  - 10.1.1. A statement of experience and expertise in strategic planning; public consultation and project facilitation.
  - 10.1.2. A list of all sub-consultants to be engaged by the prime consultant, with details of the areas for which each will be responsible;
  - 10.1.3. A list of key personnel who will be assigned to the project, identifying the areas of expertise of each and indicating their involvement in the project;
  - 10.1.4. Identification of a Project Manager
  - 10.1.5. A detailed cost estimate for the project to include manpower costs per individual, the per diem rate and the proportion of costs for each part of the study;
  - 10.1.6. Clarification of specific requirements of the Township of Muskoka Lakes and/or any exclusion from the scope of the work;
  - 10.1.7. Based on the Terms of Reference, a work plan indicating key decision points, timing of work and meetings with the Project Manager and/or Project Team; and
  - 10.1.8. References from other similar clients.
- 10.2. The Township reserves the right to interview Respondents as part of the Proposal Evaluation Process.

## 11. FEES & COSTS

- 11.1. The Respondent shall provide in their proposal the proposed fees and costs that shall not be exceeded without the advanced written permission of the Township of Muskoka Lakes. The project costs shall include all costs including sub-consultants, travel and administration expenses and printing costs.

## 12. FORM OF PROPOSAL

- 12.1. All Proposals must be submitted electronically in .PDF format to the Director of Legislative Services, Crystal Paroschy, at [cparoschy@muskokalakes.ca](mailto:cparoschy@muskokalakes.ca).

### 13. **PROPOSAL SUBMISSION FORMAT - INSTRUCTIONS TO RESPONDENTS**

Respondents are required to provide a written response regarding each of the following items.

This information shall be submitted with the balance of the required documents provided by the Respondent however, it is **essential** that the **document FORMAT** be contained as one distinct section and, that it **adheres directly to the same numbering, sequence and topics** as those listed following.

This will enable the evaluation committee to perform a more effective review of submissions. Failure to do so may eliminate the Proposal from further consideration.

The Respondent's proposal should be as concise as reasonably possible, and include, at a minimum, response to each of the following items:

#### **Section 1      Company Overview**

Clearly identify the prime firm submitting the proposal. Identify any other firms that may be involved (sub-contracted) on your behalf and their legal/contractual relationship with the prime firm along with the expertise and respective projected costs of their involvement.

#### **Section 2      Project Manager & Support Staff**

Provide a resume of the Project Manager and Support Staff that would be directly involved in the project, indicating experience, credentials and notable achievements in the area of this work assignment. Evaluation of the Project Manager and Project Support Staff will include an assessment of the firms overall ability to provide adequate resources to this project.

The Township will expect these key personnel to be committed to the project as described in the proposal, if successful with the award, any changes in these personnel must be approved, in advance, by the Township.

#### **Section 3      Experience on Similar Projects**

Respondents shall include at least three (3) References that outline previous **community strategic planning for projects of a similar magnitude** that have been successfully completed by their firm in the past five (5) years. This shall include the client names, contact and contact phone numbers. The Township reserves the right to contact these references, where appropriate. In the interest of fair and equitable consideration to all Respondents, please do not list the Township of Muskoka Lakes as a reference for this Section.

Note that each reference is not to exceed one 8.5"x11" page in length and one picture, a maximum one quarter the size of the page, is allowed.

**Section 4 Project Understanding and Work Plan**

Respondents are to confirm their understanding of the Scope of Work and clearly define how they would go about to achieve same, including noting the sequence and timing of all project phases.

**Section 5 Schedule of Work**

Respondents shall indicate when work would be commenced and, approximately how long it would take to complete the assignment. Meeting dates, other key events and major project deliverables should be clearly identified on the project schedule.

**Section 6 Financial**

Provide a detailed accounting of the costs associated with each of the tasks listed in Section 3. These costs are to be summarized as provided for on the Schedule of Fees and included in the Proposal submission.

Include all costs, including travel and other applicable costs in the space provide on the Schedule of Fees.

Prices quoted in the Proposal shall include excise tax, patent, import duty, foreign exchange, and all other charges. HST must be shown as a separate item.

**Appendices**

Respondents are to include any additional information regarding their firm and/or services that could prove beneficial to the evaluation team in accessing their submission.

Respondents are required to include in their response, the Respondent's Declaration as shown in Appendix "A" to this RFP.

Respondents are required to include in their response if any Addenda to the RFP was received (if applicable)

**14. QUESTIONS AND INQUIRIES**

Inquiries regarding this RFP are to be directed to Township of Muskoka Lakes, Director of Legislative Services, Crystal Paroschy, by e-mail to [cparoschy@muskokalakes.ca](mailto:cparoschy@muskokalakes.ca). Inquiries must not be directed to other Township employees (other than designate) or Elected Officials. **Directing inquiries elsewhere may result in your proposal submission being rejected.**

Questions of clarification will be answered individually, but response(s) to any

question that modifies the scope of the RFP will be posted on the Township's website and on Biddingo as an RFP Addendum.

Inquiries must be received no later than three (3) business days prior to the closing date of the RFP; otherwise a response may not be provided.

**15. EXAMINATION OF REQUEST FOR PROPOSAL DOCUMENTS**

Each Respondent must satisfy himself/herself by a personal study of the RFP documents, by calculations, and by personal inspection of the public information available from the Township. There will be no consideration of any claim, after submission of proposals, that there is a misunderstanding with respect to the conditions imposed by this RFP.

Prices must include all incidental costs and the Respondent must be satisfied as to the full requirements of the RFP. No claims for extra work will be entertained and any additional works must be authorized in writing prior to commencement. Should the Respondent require more information or clarification on any point, it must be obtained prior to the submission of the RFP.

The RFP will be posted and available for download on the Township's website beginning December 22, 2024 and will remain available until closing on January 29, 2024. Notice of the RFP will also be posted on Biddingo.

**16. ERRORS AND OMISSIONS**

The Township shall not be held liable for any errors or omissions in any part of this RFP. While the Township has used considerable efforts to ensure an accurate representation of information in this RFP, the information contained in the RFP is supplied solely as a guideline for Respondents. The information is not guaranteed or warranted to be accurate by The Township, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve the Respondents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

**17. RESPONDENT EXPENSES**

Any expenses incurred by the Respondent in the preparation of the Proposal submission are entirely the responsibility of the Respondent and will not be charged to the Township.

**18. ADDENDA**

18.1 If required, addenda will be posted on the Township's website <https://www.muskokalakes.ca/content/tenders-and-invitation-bid>, which is found under Bid Opportunities.

18.2 It is the Respondent's ultimate responsibility to ensure all addenda have been received.

18.3 Respondents shall be required to acknowledge receipt of addenda in their submission.

**19. PROPOSAL CLOSING**

Proposal submissions must be received electronically by Monday, January 29, 2024 at **1:00 p.m. local time.**

**20. LATE SUBMISSIONS**

Proposals received after the official closing time will not be considered during the selection process and will be returned unopened to the respective Respondent.

**21. PROPOSAL WITHDRAWAL**

21.1. A Respondent who has already submitted a proposal may submit a further proposal at any time up to the official closing time. The last proposal received shall supersede and invalidate all proposals previously submitted by that Respondent.

21.2. A Respondent may withdraw their proposal at any time up to the official closing time by notifying the Project Manager in the email provided. Such a submission must be received in sufficient time to be marked before 1:00 p.m. on the date for closing of proposals.

21.3. No Respondent may withdraw their proposal for a period of 60 days after the actual date of closing.

**22. PROPOSAL OPENING**

Respondents are advised there will not be a public opening for this RFP. Submissions received, by the date and time of closing, will be opened administratively by respective members of the Township at a time subsequent to the closing.

**23. ACCEPTANCE OR REJECTION OF PROPOSAL**

23.1 The acceptance of a proposal will be contingent upon, and not necessarily limited to, an acceptable record of ability, experience, and previous performance.

23.2 The Township reserves the right to reject any or all proposals and to waive formalities as the interests of the Township may require without stating reasons therefore.

23.3 No proposal shall be accepted from or awarded to any individual, partnership or corporation that is in tax arrears with the Township of Muskoka Lakes, or

that may be deemed irresponsible or unreliable to the Township. Notwithstanding and without restricting the generality of the statement immediately above, the Township shall not be required to award and accept a proposal or recall the proposals at a later date:

- 23.3.1 When only one (1) proposal has been received as a result of the proposal call;
  - 23.3.2 Where the lowest responsive and responsible Respondent's proposal substantially exceeds the estimated cost of the goods or service;
  - 23.3.3 Where the proposal documents do not state a definite, or are based on an unreasonable delivery/work schedule;
  - 23.3.4 When all proposals received fail to comply with the specifications or proposal terms and conditions; or
  - 23.3.5 Where a change in the scope of work or specifications are required.
- 23.4 The Township shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Respondent 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 except as provided in the proposal document.
- 23.5 Proposals received after the official closing time will not be considered during the selection process and will be returned unopened to the respective Respondent.
- 23.6 Each proposal shall be open for acceptance by the Township for a period of sixty (60) calendar days following the date of closing.



**24. PROPOSAL EVALUATION CRITERIA**

24.1. Proposals will be evaluated based on, but not limited to, the following:

<b>Evaluation Criteria</b>	<b>*Weight Factor</b>
Strength of the proposed Project Team as evidenced by: <ul style="list-style-type: none"> <li>• Experience and Qualifications as evidenced by:               <ul style="list-style-type: none"> <li>• Company background and history</li> <li>• Relevant experience with other projects</li> <li>• Client references</li> </ul> </li> <li>• Appropriateness of management personnel and technical staff proposed</li> <li>• Organizational approach to project management including workflow, reporting and quality assurance procedures</li> <li>• Relevant experience with other projects</li> </ul>	30%
Ability to successfully complete the project as evidenced by: <ul style="list-style-type: none"> <li>• Adequacy of resources</li> <li>• Ability to complete work on a timely basis and meet deadlines/demonstrated the ability to meet the tight timeline</li> <li>• Methodology employed to meet with timeline</li> <li>• Approach to consultation and communications</li> </ul>	30%
Response Characteristics: <ul style="list-style-type: none"> <li>• Adherence to the required format</li> <li>• Completeness of submission</li> </ul>	15%
Proposal Cost: <ul style="list-style-type: none"> <li>• Overall Budget/Value for work proposed</li> </ul>	25%

**25. VERIFICATION OF INFORMATION**

The Township shall have the right to:

25.1 Verify any Respondents statement or claim by whatever means the Township deems appropriate, including contacting persons in addition to those offered as references; and/ or

25.2 Access the Respondent's premises where any part of the work is to be carried out to confirm Proposal information quality of processes and to obtain assurance of viability; and/or

25.3 The Respondent shall co-operate in the verification of information and is deemed to consent to the Township verifying such information.

**26. SELECTION PROCESS**

Proposals will be assessed on the basis of information provided by the Respondent at the time of submission as well as any additional information provided during subsequent discussions with the Respondent if required. The evaluation of Proposals will be conducted by an evaluation team comprised of staff members from the Township.

**27. OWNERSHIP**

The information, reports, documentation, plans, etc that are a product of this award by the successful Respondent, will become the exclusive property of the Township.

**28. PROPOSAL AWARD PROCEDURES**

Unless stated otherwise the following procedures will apply:

28.1 The Township will notify the Successful Respondent of the award within thirty (30) calendar days of the Proposal Closing.

28.2 Notice of Acceptance of Proposal will be by written notice (electronically).

**29. AWARD**

It is the intention of the Township to award the contract arising from this RFP process to One (1) qualified Respondent. The Township will notify the participating Respondents electronically with respect to the selection of the recommended Respondent.

**30. SUB-CONSULTANTS**

No sub-consultants or collateral agreements (other than those identified in the Proposal submission) shall be permitted with respect to the work of this assignment, except with the Township's express written consent and, in advance of commencement of sub-consultant activities.

**Failure to obtain this consent may result in cancellation of the contract with the successful Respondent.**



**31. ASSIGNMENT OF CONTRACT**

The successful Respondent shall not assign, transfer, convey, sublet or otherwise dispose of this contract or their right, title or interest therein, or their power to execute such contract, to any other person, company or entity, without the previous consent, in writing, of the Township's officials, which consent shall not be unreasonably withheld.

**32. REQUIREMENTS AT TIME OF EXECUTION**

32.1 Subject to an award of the agreement, the Successful Respondent is required to submit the following documentation in a form satisfactory to the Township for execution within eleven (11) calendar days after being notified to do so in writing:

32.1.1 Insurance Documents;

32.1.2 Clearance Certificate from the Workplace Safety and Insurance Board;

32.1.3 Safety Policies and Procedures and related documentation; and

32.1.4 Non-Disclosure Agreement.

32.2 If the Successful Respondent for any reason, defaults or fails in any matter or item referred to under "Requirements at Time of Execution", the Township reserves the right to accept any other proposal submission, advertise for new proposals or carry out the work in any way as the Township may, at its sole discretion, deem best.

32.3 Following receipt of the documents the successful Respondent will enter into a Professional Services Agreement with the Township to proceed with the Work.

**33. INDEMNIFICATION**

The Successful Respondent, its officers, agents or employees and if applicable all sub- contractors shall at all times indemnify and save harmless the Township from and against any and all manner of claims, demands, losses, costs, charges, actions and other proceedings whatsoever made or brought against, suffered by, or imposed on the Township in respect of any loss, damage or injury to any person or property directly or indirectly arising out of, resulting from, or sustained, as a result of this Agreement, provision of services or any operations connected therewith caused by or resulting from the negligent or willful acts or omissions of the Successful Respondent, its officers, agents or employees or if applicable its sub-contractors.

**34. CONFLICT OF INTEREST**

Respondents must ensure that they are not in a position that may be perceived as a conflict of interest.

**35. REGULATION COMPLIANCE AND LEGISLATION**

The successful Respondent shall ensure all services and products provided in respect to this Proposal are in accordance with, and under authorization of all applicable authorities, Municipal, Provincial and/or Federal legislation.

**36. CANCELLATION**

36.1 The Township reserves the right to immediately terminate the Contract for sufficient cause, including but not limited to such items as non-performance, late deliveries, inferior quality, pricing problems, etc.

36.2 The Township may elect to terminate the Contract if the original terms and conditions are significantly changed, giving thirty (30) days written notice to the Contractor.

36.3 Either party may terminate the Contract by giving the other party sixty (30) days written notice, giving reasons acceptable to the other – subject to approval by both parties. A period of less than sixty (30) days to terminate the contract may be negotiable if mutually agreeable among the parties involved in the Contract.

**37. GOVERNING LAWS**

This RFP and subsequent contract/agreements will be interpreted and governed by the laws of the Province of Ontario.

**38. FREEDOM OF INFORMATION**

Any personal information required on the Proposal Form is received under the authority of The Township of the Township of Muskoka Lakes. This information will be an integral component of the quote submission.

All written Proposals received by the Township become a public record, once a Proposal is accepted by the Township, and a contract is signed, all information contained in them is available to the public, including personal information.

Questions about collection of personal information and the Municipal Freedom of Information and Protection of Privacy Act, 1989, R.S.O. 1990, Chapter M.56, as amended, should be directed to:

Director of Legislative Services, Crystal Paroschy,  
Township of Muskoka Lakes Municipal Office, 1 Bailey  
Street, Port Carling, ON P0B 1J0,  
Telephone (705) 765-3156

The Director of Legislative Services has been designated by The Township of the Township of Muskoka Lakes to carry out the responsibilities of the Act.

**39. HEALTH AND SAFETY**

The Successful Respondent shall provide the Township, prior to commencement of work, with a written copy of the Health and Safety Policy for their firm along with Health and Safety procedure(s) relevant to the work to be performed where applicable. If the firm does not have written procedures relevant to the work, then the firm will be expected to abide by the Township's safety procedures in accordance with the Occupational Health and Safety Act (re: duties of employers).

**40. WORKPLACE SAFETY AND INSURANCE BOARD**

The Successful Respondent shall provide the Township with a copy of the Workplace Safety and Insurance Board's Clearance Certificate (or Independent Operator Certificate, as applicable) indicating the Respondent's good standing with the Board at any time when requested by the Township.

**41. INSURANCE**

- 41.1 The Successful Respondent at their sole cost and expense shall insure its activities in connection with the work under this Agreement and obtain, keep in force, and maintain insurance as follows:
- 41.2 Comprehensive General Liability Insurance including but not limited to bodily injury including death, personal injury, property damage including loss of use thereof, broad form contractual liability, Townships and contractors' protective, products and completed operations, non-owned automotive liability and contain a cross liability, severability of insured clause in an amount of not less than five million dollars (\$5,000,000.00) applying to all claims on a per occurrence basis. The policy shall include the Township as additionally insured in respect of all operations performed by or on behalf of the Successful Respondent.
- 41.3 Professional Liability (Errors and Omissions) Insurance in the amount of one million dollars (\$1,000,000) per claim and two million dollars (\$2,000,000) in aggregate. Such insurance shall provide coverage for all errors and omissions made by the professional in the rendering of, or failure to render, professional services in connection with the work under this Agreement. Upon completion of the work under this Agreement the policy shall remain in force for twelve (12) months. The insurance shall not have a retroactive date less than prior to the placement of this policy or coinciding with the effective date of this Agreement. If a retroactive date should apply to this policy, confirmation that the retroactive date is not in effect after the commencement of work under this Agreement must be included in the certificate of insurance.
- 41.4 Prior to commencement of any work associated with this Agreement and upon the placement, renewal, amendment, or extension of all or any part of the insurance, the Successful Respondent 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 any work associated with this Agreement.

- 41.5 All policies shall be endorsed to provide 30 days advance notice to the Township of any modification, change, or cancellation.
- 41.6 All policies shall include a provision that the coverage will be primary and will not participate with nor be excess over any valid and collectible insurance or program of self- insurance carried or maintained by the Township.
- 41.7 All policies shall be with insurers licensed to underwrite insurance in the Province of Ontario.
- 41.8 If the Successful Respondent fails to maintain insurance as required by the Agreement, the Township shall have the right at their sole discretion to: terminate the Agreement; provide the Successful Respondent with 2 business days to provide confirmation that coverage is in effect; or, provide and maintain such insurance and give evidence to the Successful Respondent and the Successful Respondent shall pay the cost thereof to the Township on demand or the Township may deduct the cost from the amount which is due to or may become due to the Successful Respondent.
- 41.9 All applicable deductibles under the above required insurance policies are at the sole expense of the Successful Respondent.
- 41.10 It is expected by the Township that the Certificate(s) of Insurance will provide confirmation that all insurance requirements as stated under Section 23 have been met.
- 41.11 If applicable and based upon the operations of any sub-contractor, Section 23 shall apply in the same manner to any sub-contractor as it would to the Successful Respondent. Further, it is the Successful Respondent's obligation to ensure that any sub-contractor is aware of these obligations. The Successful Respondent shall provide to the Township confirmation of the sub-contractor's insurance.

## **42. REGULATION COMPLIANCE AND LEGISLATION**

- 42.1 All work provided must be in accordance with all laws and regulations pertaining to the work. The laws of the Province of Ontario shall govern this proposal and any subsequent agreement resulting from this proposal.
- 42.2 The Successful Respondent shall ensure all services and products provided in respect to this proposal are in accordance with, and under authorization of all applicable authorities, Municipal, Provincial and Federal legislation.

**43. COMPLIANCE WITH THE ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT, 2005**

The Successful Respondent will ensure that all its employees, agents, volunteers, or others for whom the Successful Respondent is legally responsible receive training regarding the provision of the goods and services contemplated herein to persons with disabilities in accordance with the Accessibility for Ontarians with Disabilities Act, 2005, as amended the "Act").

The Successful Respondent will ensure that such training includes, without limitation, a review of the purposes of the Act and the requirements of the Regulation, as well as instruction regarding all matters set out in the Regulation.

The Successful Respondent will submit to the Township, as required from time to time, documentation describing its customer service training policies, practices and procedures, and a summary of its training program, together with a record of the dates on which training was provided and a list of the employees, agents volunteers or others who received such training. The Township reserves the right to require the Successful Respondent to amend its training policies to meet the requirements of the Act and the Regulation.

**44. LAWS, NOTICES, PERMITS & FEES**

The successful Respondent shall obtain the necessary permits, licenses and pay the required fees for the assignment, which are in force at the date of the Proposal Closing.

The successful Respondent shall provide the required notices upon request and comply with the laws, ordinances, rules, regulations, codes and orders of the authorities having jurisdiction, which are, or become, in force during the period for which services are performed in accordance with the schedule of work.

**45. HARMONIZED SALES TAX (HST)**

HST is applicable to the requirements of this Proposal and should be shown separately on the Schedule of Fees.

**46. LIMITED LIABILITIES**

The liability under this Proposal shall be limited to the actual goods/services ordered and provided.

**47. PERFORMANCE**

Any undue delays in the execution of the work and/or costs incurred by the Township due to inefficiencies in performance on behalf of the successful Respondent shall be deemed to be the responsibility of that Respondent and as such, any and all costs,

as deemed appropriate and reasonable compensation for the Township, will be assessed to the Successful Respondent.

**48. PROGRESS OF WORK AND TIME FOR COMPLETION**

**Time shall be the essence for completion of the Project.** The Consultant will include a schedule for the work in the proposal. The Schedule shall be subject to acceptance of the Township and shall be updated from time to time as requested by the Township. No work shall commence on the assignment until the Schedule of Work has been approved by the Township. All costs to prepare the Schedule of Work shall be at the successful Respondent's expense.

If the agreed upon time limits are not sufficient to permit completion of the work by the successful Respondent working a normal number of hours each day or week, it is expected that additional and/or augmented shifts will be required throughout the life of the work to the extent deemed necessary for the successful Respondent to ensure that the work will be completed within the time limit specified. Any additional costs occasioned by compliance with these provisions will be considered to be included in the prices for the various items of work and no additional compensation will be allowed therefore.

**49. EXTRA WORK**

No work shall be regarded as extra work, unless it is ordered in writing by the Township and with the agreed price for the same specified in said order, provided said price is not otherwise determined by the Proposal. A statement of the cost of extra work shall be made within thirty (30) calendar days after the completion of the said extra work.

**50. PATENT, COPYRIGHT, OR OTHER PROPRIETARY RIGHTS**

In accordance with Municipal Freedom of Information and Protection of Privacy Act, Respondents are reminded to clearly identify in their Proposal material, any specific scientific, technical, commercial, proprietary, intellectual or similar confidential information, the disclosure of which could cause them injury or damage.

Respondents are encouraged to place all such details and information within a separate section of their submission. Complete proposal details are not to be identified as confidential.

All works/reports created as a result of the process become the property of the Township of Muskoka Lakes.

**51. CONFIDENTIALITY UNDERSTANDING**

The successful Respondent and its employees may have access to information confidential to the Township. This information may include, but is not limited to, terms of this agreement, business methods and systems, contractual terms, pricing,

personal information, etc. subject to disclosure by force of law, the successful Respondent agrees that it and its employees who have access to this information shall not either during the term of the agreement or at any time thereafter reveal to any third party any of this confidential information or use in any way, wither on the successful Respondents behalf or on behalf of any third party, any such information.

The parties acknowledge that unauthorized disclosure or use of confidential information could cause irreparable harm and significant injury to the Township, and as such monetary damages may not be sufficient remedy for this breach. Accordingly, the parties agree that the Township will have the right to seek and obtain specific performance and/or injunction relief to enforce the obligations of this agreement in addition to any other rights and remedies it may have.

All records, files, materials, computer programs, data and any other materials belonging to the Township that may come into the possession or control of the successful Respondent shall at all times remain the property of the Township. Upon expiry, termination of this agreement for any reason and upon written request, the successful Respondent shall immediately delivery to the Township all such property of the Township remaining in its possession or control.

The obligations of this section survive the expiration or termination of this agreement indefinitely.

**52. SOLICITATION**

If any director, officer, employee, agent or other representative of a Respondent makes any representation or solicitation to any Mayor, Councillor, officer or employee of the Township with respect to the proposal, whether before or after the submission of the proposal, the Township shall be entitled to reject the proposal.

**53. PUBLICITY**

All publicity relating to this project is subject to the approval of the Township and no mention of the project in advertising or articles in any publication will be permitted unless authorized in advance, in writing by the Township. Publicity or advertising implying endorsement of a product by the Township will not be permitted.

**54. CONTACT**

The Project Manager is the Chief Administrative Officer for the Township. All inquiries shall be directed to the Project Manager as outlined below.

Derrick Hammond,  
Chief Administrative Officer  
Township of Muskoka Lakes  
Phone: (705) 765-3156 Ext. 272  
[dhammond@muskokalakes.ca](mailto:dhammond@muskokalakes.ca)

**APPENDIX "A"**

**THIS PAGE MUST BE RETURNED AS PART OF THE PROPOSAL SUBMISSION**

**RESPONDENT'S DECLARATION**

The Respondent has carefully examined the conditions attached to this Request for Proposal and is prepared to perform the work as outlined in this document in an expedient, professional and workmanlike manner, promptly and as directed by the Chief Administrative Officer.

No person, firm or corporation, other than the Respondent, has any interest in this proposal or in the proposed services for this proposal.

This proposal is made without any connection, comparison of figures, or arrangements with, or knowledge of any other corporation, firm or person making a proposal for the same Service and is in all respect fair and without collusion or fraud.

No member of the staff of the Township of Muskoka Lakes is, or will become interested directly or indirectly; as a contracting party, partner, shareholder, surety or otherwise; or in the performance of the Service; or in the supplies, service or business to which it relates; or in any portion of the profits thereof; or in any of the monies to be derived there from.

The content and requirements of this RFP have been read and understood. All prices are quoted in Canadian funds.

DATED AT \_\_\_\_\_ THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 2024.

\_\_\_\_\_  
**SIGNATURE OF WITNESS**

\_\_\_\_\_  
**SIGNATURE OF RESPONDENT**