

# **Township of Alnwick/Haldimand**

## **Request for Proposal**

### **Organizational Review Consulting Services**

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## **1.0 General Overview**

The Township of Alnwick/Haldimand is issuing a Request for Proposal (RFP) for the services of a Consulting Firm ('Firm') to complete a comprehensive Organizational Review. The review is to involve an analysis of the organizational structure in relation to corporate, departmental and staff responsibilities and workload. The review requires the identification of options and development of recommendations that will ensure efficiency and effectiveness in meeting current and anticipated (5-10 years) service delivery requirements and to provide for implementation of strategic priorities.

It is understood that the information in the RFP is a combined Statement of Qualifications (Qualifications) and a Price Proposal (Proposal) and shall be the general basis for the selection of a Firm to provide this professional service and study.

The Township expects to select the highest scoring Firm based on a structured scoring evaluation. The scoring evaluation (Section 7 and Table 1) shall consider each Firm's ability to perform the required service, experience, approach to the project, the personnel assigned to the actual project work, the costs of the project, the time period in which the project will be completed, the reference checks and the clarity of the submission, in relation to the scoring matrix.

## **2.0 Township Information**

The Township of Alnwick/Haldimand is a lower-tier municipality within the County of Northumberland. Alnwick/Haldimand is a growing community with a permanent population of 6,869 (2016 Census). The highest density of population is situated on the north shore of Lake Ontario and along the south shore of Rice Lake. The Township is 398.57 sq. kilometres in size and has approximately 404 kilometres of Municipal roads to maintain to Municipal standards. The Township is predominantly agricultural in nature as defined by its physical characteristics and history but it is also now characterized as a residential area as many individuals are seeking to live in an area where countryside preservation and controlled development exist hand-in-hand with convenient access to job markets, hospital and schools.

The Municipality has a number of Hamlets (Burnley, Centreton, Fenella, Grafton, Lakeport, Roseneath, Vernonville, Eddystone, and Wicklow) geographically positioned throughout the whole Municipality. There is a significant number of business and commercial enterprises scattered though the whole Township that provide local services and products. As well, a variety of highly specialized resorts and tourist destinations are thriving and are defining our municipality as an excellent place to freely experience the natural beauty of the lakes and countryside.

The Township is governed by a 5 member Council and employs 22 full-time and 9 part-time (casual, contract and part-time) personnel. Under the direction of the Council, the Township's organizational structure consists of a Chief Administrative Officer and 8 Departments as

depicted in Table 3 - Organizational Structure. In addition, the Library CEO reports directly to the Library Board and participates actively with the Township Management Team.

The Township's fire department and library service each operate with a combination of paid staff and volunteers.

## **3.0 The Project**

### **3.1 Purpose of Review**

The purpose of an organizational review is to assess the existing processes, practices, staffing and organization to identify opportunities for improvement that will optimize service delivery while making the best use of resources. It is good business practice to undertake such reviews from time to time to ensure that the Township's structure remains current in light of ever-increasing expectations, workload pressures, staffing challenges, changing Council priorities, provincial legislation and program changes.

### **3.2 Project Requirements**

#### **3.2.1. Proposed Scope of Work**

The successful Firm shall develop and execute a process in consideration of the following guidelines/requirements and having regard for the purpose of the review as set out in section 3.1:

#### **Background**

- High level review of each department's operational functions, workflow processes and job descriptions.
- Consideration of the role that the Township Strategic Plan and various long-term planning documents (see Table 2) have on resourcing requirements and shaping the design of the organization.

#### **Consultation**

- Identify the means of consultation to facilitate the review, including:
  - Conduct interviews on an individual basis with members of Council, Management Team and staff (on a voluntary basis).
  - Develop and distribute a questionnaire for Council members, Department Managers and staff using a limited number of questions to further identify key issues and suggestions.

- Consult with Library CEO and Library Board.
- Consider input through departmental meetings, meeting with Managers and Council meetings, inter-departmental focus groups, etc...

## **Review and Evaluation**

Review and evaluate the present utilization and adequacy of human resources within each department.

- Assess the functional assignments and staffing levels required to perform duties.
- Assess current supervisory ratios based on best practices and organizational needs.
- Assess the Township's current organizational structure in light of the Township's goals and service/regulatory requirements.
- Assess ways to minimize requirement for over-time to complete core duties.
- Assess interdepartmental collaboration within the Township and recommend organizational or process improvements by maximizing the use of existing resources and ensure effective cross-training practices are in place.
- Identify options and make recommendations to improve the efficiency and effectiveness of the structure. Note: these recommendations are to reflect a practical and manageable implementation approach to enable the Township to move forward with solutions.
- Assess current risk management practices and make recommendations as may be appropriate.
- Assess current use of technology and make recommendations as may be appropriate.
- Analyse external issues and trends along with a projection of the impact that they will have on the organization and recommend a means to address them.
- Identify skills, abilities, training, and mentoring needs for areas of responsibility and succession planning considerations that are appropriate to meet current and emerging workload needs within each department's functional areas of responsibility; provide comparisons with other similar jurisdictions and make recommendations on appropriate changes.

### **3.2.2. Qualifications of Firm**

The Firm shall demonstrate:

- A thorough knowledge and understanding of organizational/operational reviews and process redesign;
- Expertise and capacity to perform the necessary engagement, process facilitation and consultations;
- Several years of experience in working with local governments in Ontario and demonstrated ability to conduct research, facilitate reviews of this nature, write reports and deliver the plans on time and on budget.

### **3.2.3. Role of Firm**

The Firm will provide independent expertise and advice and shall:

- Guide, manage and monitor the progress of the review process;
- Identify and implement methods to engage and obtain feedback/involvement from all levels of the organization;
- Prepare and execute a project communications plan to keep Council and staff informed of the progress of the review;
- Prepare, provide and present a preliminary findings report to summarize key findings and key issues requiring consideration that will be included in the report;
- Recommend options for organizational change and the associated cost/savings related thereto;
- Provide expert advice on each key recommendation that meet the requirements set out in sections 3.1 and 3.2;
- Prepare, provide and present draft report to the Township Council, C.A.O. and Department Managers;
- Prepare final report incorporating any changes after reviews of draft(s).

### 3.2.4. Deliverables

The following items shall be delivered to the Township upon completion of the final report:

- One (1) unbound copy of the final report, to include background, summary of input, recommendations, cost/savings estimates, etc...;
- Five (5) bound copies of the final report to include summary of background, summary of input, recommendations, cost/savings estimates, etc...;
- One (1) electronic copy of the above report in Microsoft Word, formatted in accordance with AODA Regulation 191/11;
- All materials received and produced by the Firm in the undertaking of this project; and
- In general, all reports and presentation materials shall be in a form and of a quality so as to be acceptable for reproduction and presentation, and shall be acceptable to the Township. All information and files required to complete this project will become property of the Township.

### 3.2.5. Project Timetable

Activity	Date
Request for Proposal Issued	December 14, 2018
Request for Proposal Closed	January 16, 2019
Selection of Successful Respondent	January 17, 2019
Review Commences	January 18, 2019
Preliminary Findings Report	March 15, 2019
Submission of Draft Report	2 weeks on advance of Presentation Date of Draft Report
Presentation of Draft Report	May 9, 2019
Final Report	May 16, 2019

**Note: although every attempt will be made to meet all dates, the Township reserves the right to modify any or all dates at its sole discretion.**

## 4.0 Information Required - Qualifications

Each Firm shall respond to each of the following questions in a clear and comprehensive manner.

- a) Provide the full name and main office address of the Firm.

- b) Identify when the Firm was organized and if a Corporation, when incorporated and how many years engaged in providing this type of service.
- c) Identify and set out the qualifications of any Firms or individuals that the Firm intends to subcontract, or otherwise use, to perform work on this project.
- d) Describe the Firms specific and relevant experience related to the scope of this project.
- e) Describe the Firm's depth and resources that would also be available for the benefit of this project.
- f) Describe the Firm's understanding of the Project – Scope of Work and approach to complete the project, staff/council engagement and how it will achieve the timetable. Include innovative approaches that have been used in other organizational reviews to gain acceptance and allow for a better understanding of the project's goals.
- g) Set out the various components of the project including demonstrating how the project will be completed.
- h) Identify the personnel who would take the lead position in this project and set out their particular qualifications and experience in carrying out this type of work.
- i) Identify the amount of municipal staff time required.
- j) Provide references from three (3) recent projects that relate to this project that the Firm has completed and, if not included in the forgoing, a reference from a municipality of similar size and geographic components as the Township.

## **5.0 Information Required - Proposal**

Each Firm must respond to each of the following areas in a clear and comprehensive manner.

- a) Provide a confirmed price for the project and expected payment schedule (Schedule A).
- b) Specifically identify any additional work or services that exceed the services requested herein and the associated costs thereof.
- c) A detailed project schedule including timelines for each component of the project.
- d) Signed Declaration (Schedule A).
- e) Complete "Schedule B – Detailed Components"

## 6.0 RFP – Submission Details

Event Detail	Date
Request for Proposal (RFP) Issued	December 14, 2018
Submission Deadline	11:59:59 am (noon) January 16, 2019

Each Firm shall submit five (5) bound copies of the RFP no later than **11:59:59 a.m. (noon) on January 16, 2019** as follows:

**Courier Delivery Address: (do not mail submission)**

Township of Alnwick/Haldimand  
10836 County Road 2  
Grafton, ON  
K0K 2G0

The outside of the shipping carton/envelope must be clearly marked "Request for Proposal – Organizational Review" together with the Firm's name and delivery address. Any Proposals received after the above deadline will be returned unopened to the Firm.

## 7.0 Scoring of Qualifications and Proposals

The evaluation of the RFP will be carried out by an evaluation team comprised of Township staff. Firms will be evaluated based on the points system identified in Table 1. Failure to provide relevant information may result in penalties being assessed on the evaluation score.

In addition, and at the sole discretion of the evaluation team, an interview may be required. The purpose of this interview would be to clarify the qualifications of the Firms.

## 8.0 Pre-Submission and Other Information

If any Firm has questions concerning this RFP, finds discrepancies or omissions in the document, or requires clarifications, such matters shall be submitted in writing to:

Robin van de Moosdyk	Telephone	(905) 349-2822, ext. 32
CAO/Clerk	Fax	(905) 349-3259
	E-mail	rvdm@ahtwp.ca

Contact with Township Council members is prohibited and can be considered as grounds for disqualification from the selection process.

The Township reserves the right to request additional data or information after the Proposal date, if such data or information is considered pertinent, in the Township's sole view, to aid the review and evaluation process.

The Township reserves the right to supplement, add to, delete from and change this solicitation document. Firms will be advised by fax or e-mail of any changes that are made.

The Township reserves the right to reject any portion of any RFP and/or reject all RFPs, to waive any informalities or irregularities in the RFP, or to re-invite, or to advertise.

**Table 1 – Scoring Matrix**

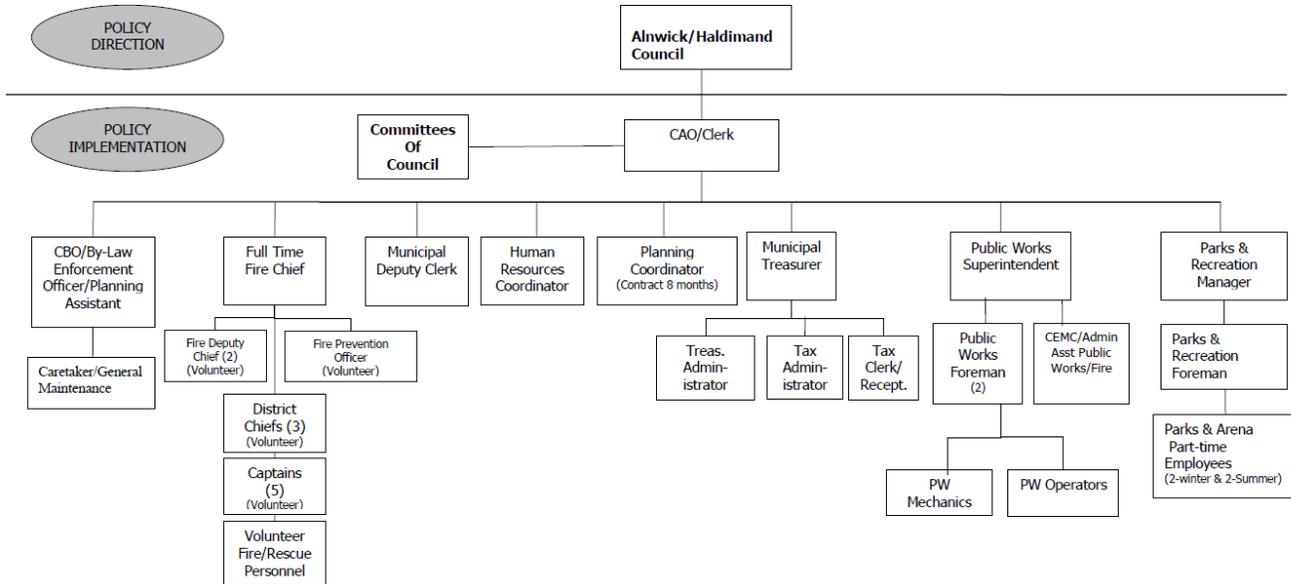
<b>Criteria</b>	<b>Maximum Points</b>	<b>Points Scored</b>
1. Firm and Key Personnel Experience <ul style="list-style-type: none"> <li>• Direct Firm and principal staff experience with relevant experience</li> <li>• The experience of the members of the Firm that will be assigned to this project</li> <li>• Appropriate reference information gathered from customers that the Firm has provided like services</li> </ul>	10  15  5	
2. Project Approach <ul style="list-style-type: none"> <li>• Quality of overall approach, work methodology, identification of project constraints</li> <li>• Work plan and schedule (responsiveness to meet or exceed requirements)</li> </ul>	15  15	
3. Consulting Services Cost <ul style="list-style-type: none"> <li>• Cost of consulting services with details as to the method and basis of compensation including a breakdown of overall cost including all fees and other charges</li> </ul>	40	
<b>Total Score</b>	<b>100</b>	

**Table 2 - Various Planning Reports and Other Materials**

Strategic Plan	Five Year Economic Development Strategy
Asset Management Plan	Parks Master Plan

**Table 3 – Organizational Structure**

**TOWNSHIP OF ALNWICK/HALDIMAND – ORGANIZATIONAL STRUCTURE  
as of April 27<sup>th</sup>, 2018**



**Schedule "A"**  
(Schedule to be completed and returned)

**Price and Declaration**  
**Organizational Review – Consulting Services**

**Information to the Respondent.**

In order for the RFP to be complete, all areas of the Price and Declaration - Schedule "A" (this form) must be completed and any other information as requested in the RFP must be provided.

**Price**

The total price to complete an Organizational Review for the Township of Alnwick/Haldimand.

\$ \_\_\_\_\_

\$ \_\_\_\_\_ HST

\$ \_\_\_\_\_ **Grand Total**

**Complete Schedule "B" to provide a detailed costing by component.**

**Expected Payment Schedule**

\_\_\_\_\_

## Declaration

1. I/We Declare that this RFP is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm or person making a RFP for the same purchase and is in all respects fair and without collusion or fraud.
2. I/We Declare that all matters stated in the submitted RFP are in all respects true.
3. I/We have carefully read the requirements as per the RFP, and have satisfied ourselves as to the conditions under which the transaction and subsequent items to be supplied, and do hereby submit an RFP for **Consulting Services for an Organizational Review**.
4. I/we acknowledge that \_\_\_\_\_ addenda have been received and that it is my/our ultimate responsibility to ensure all addenda issued have been received.
5. If selected as the successful Firm, I/We agree to abide by the terms as set out in the RFP Qualifications and Price with its specifications and provisions for the prices shown.
6. The price submitted shall be firm for a period of not less than sixty (60) calendar days from the closing date of this RFP.

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 2019.

) \_\_\_\_\_  
) Signature  
)

) \_\_\_\_\_  
) Signing Authority (Print Name)  
)

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

) \_\_\_\_\_  
) Street Address/City/Town/Postal Code  
)

) \_\_\_\_\_  
) Telephone Email Fax Number

**'Schedule B - Detailed Components'**

<b>Details of Consulting Services</b>				
	<b>Action Item</b>	<b>Expected Deliverable</b>	<b>Cost/Action</b>	<b>Notes</b>
<b>Organization Review</b>	Background	Background Info - existing structure, job descriptions, existing master plans		
	Consultation	Consultation - staff, Council		
	Review and Evaluation	Assess staff levels, trends, future needs and identify issues requiring consideration		
	Prepare and Present Preliminary Findings Report	Prepare preliminary report for Council and Management Team - March		
	Develop Recommendations	Develop recommendations including rationale and estimated costs/savings		
	Prepare Draft Report	Prepare draft report Present to Council & Management Team - May		
	Prepare Final Report	Prepare Final Report - May		
<b>Consulting Organization Review- Total</b>				

**Additional Pricing - list details**

**Grand Total**

*(Matches Schedule A - Price)*