



**The Corporation of the
Township of Brock**

**Request for Proposal
BROCK-RFP No. 2020-01**

**Organizational Review
Consulting Services**

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1.0 General Overview

The Township of Brock ('Township') 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 Brock is located on the east shore of Lake Simcoe approximately 1 hour northeast of Toronto. The municipality presents three distinct urban areas, numerous hamlets, and beautiful countryside. While agriculture is our largest employer, a full range of commercial and industrial businesses are located within the urban areas of Beaverton, Cannington and Sunderland. The Township's location on Lake Simcoe and the Trent-Severn Waterway make it a popular destination for tourists in both summer and winter.

The municipality was created as a result of the proclamation of the Regional Municipality of Durham Act, S.O.1973 and consists of the former Townships of Brock and Thorah, the Village of Beaverton, the Village of Cannington, and the dissolution of the Police Village of Sunderland.

The Township is governed by a seven (7) member Council (Mayor, Regional Councillor and 5 Councillors) and employs 39 full-time and approximately 10 seasonal part-time/casual employees. The Fire Department consists of 2 full time, one part time and approximately 70 plus volunteer fire fighters.

Under the direction of the Council, the Township's organizational structure consists of a Chief Administrative Officer and 5 Departments as depicted in Table 3 - Organizational Structure.

This review does not include a review of the Township of Brock Library staff or services as it is operated by the Council appointed Township of Brock Library Board.

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 and modernization opportunities 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 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 Heads and staff using a limited number of questions to further identify key issues and suggestions.
 - Consider input through departmental meetings, meeting with Managers and 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, affordable 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 current and future organization staffing requirements 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.
- Note: Market review/pay equity review is NOT part of this project.

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 Heads; and
- 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	June 5, 2020
Request for Proposal Closed 3:00 pm	June 12, 2020
Selection of Successful Respondent	June 15, 2020
Review Commences	June 16, 2020
Submission of Preliminary Findings	August 26, 2019
Preliminary Findings Report to Council	September 13, 2020
Submission of Draft Report	October ,5 2020
Presentation of Draft Report to Council	October 19, 2020
Final Report – adopted by Council	November 16, 2020

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.

Your Schedule A should include the follow:

- a) Provide a confirmed price for the project and expected payment schedule.
- 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) And a signed Declaration by the owner/partner that has authority to bind

Your Schedule B should include:

- e) Any additional detailed information to support your proposal
- f) CV's of the individuals identified to do the proposed scope of work
- g) Any examples you may wish to show of previous studies completed similar to what is being requested

6.0 RFP – Submission Details

Event Detail	Date
Request for Proposal (RFP) Issued	June 5, 2020
Submission Deadline	3:00 pm (three) June 12, 2020

Each Firm shall one (1) copy of the RFP no later than **3:00 p.m. (three) on June 12, 2020** as follows:

Courier Delivery: (Please do not mail submission)

Township of Brock
1 Cameron Street East
Cannington, Ontario
L0E 1E0

Or via email:

clerks@townshipofbrock.ca

The outside of the envelope and/or email subject line must be clearly marked "Request for Proposal – Organizational Review BROCK-RFP No. 2020-01" together with the Firm's name and delivery address.

Any Proposals received after the above deadline will be returned unopened to the Firm as per our policy.

7.0 Scoring of Qualifications and Proposals

The evaluation of the RFP will be carried out by an evaluation team comprised of The Mayor, C.A.O. and one other member of Council. 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/presentation may be required. The purpose of this interview would be to clarify the qualifications and methodology of the Firms and their proposals.

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:

Mrs. Becky Jamieson
Municipal Clerk

Telephone: (705) 432-2355 ext. 240
E-mail: bjamieson@townshipofbrock.ca

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 re-advertise.

Table 1 – Scoring Matrix

Criteria	Maximum Points	Points Scored
1. Firm and Key Personnel Experience <ul style="list-style-type: none"> • Direct Firm and principal staff experience with relevant experience • The experience of the members of the Firm that will be assigned to this project • Appropriate reference information gathered from customers that the Firm has provided like services 	15 15 5	
2. Project Approach <ul style="list-style-type: none"> • Quality of overall approach, work methodology, identification of project constraints • Work plan and schedule (responsiveness to meet or exceed requirements) 	15 15	
3. Consulting Services Cost <ul style="list-style-type: none"> • 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 • Overall value of the proposal 	25 10	
Total Score	100	

Table 2 - Various Planning Reports and Other Materials

Asset Management Plan	Roads Master Plan
10 Year Capital Plan	

Table 3 – Brock Township Organizational Chart

TOWNSHIP OF BROCK
NON-BARGAINING UNIT ORGANIZATIONAL STRUCTURE – 2020

