

TERMS OF REFERENCE (TOR)

FOR

SOUTH GEORGIAN BAY LAKE SIMCOE
SOURCE PROTECTION REGION
ASSESSMENT REPORT
LANDOWNER NOTIFICATION

ISSUED BY:

LAKE SIMCOE REGION CONSERVATION AUTHORITY



**Lake Simcoe
Region
Conservation
Authority**

Approved by:

Brian Kemp ACTING CAO
for D. Gayle Wood
Chief Administrative Officer/Secretary Treasurer

Date:

July 29/10

The following Terms of Reference describe the work to be undertaken to complete the South Georgian Bay Lake Simcoe (SGBLS) Source Protection Region's (SPR) Assessment Report Landowner Notification.

Introduction

As part of the consultation process of the South Georgian Bay Lake Simcoe (SGBLS) Source Protection Region's (SPR) Assessment Report, we are required to send a written personalized notification to all landowners who are or would be a significant threat to the region's drinking water. There are estimated to be approximately 20,000 residents across the region who will have to be notified. Because of the diversity of the region, and the number of agencies involved, the packages to be delivered will vary in composition.

Project Context and Background

All packages will contain a one-page (double sided) letter (on letterhead). The letter will have fields that will need to be personalized (name, address, roll number, contact name). An excel spreadsheet database will be provided with the information to allow for a mail merge.

Packages will then contain a combination of:

- a one page, one-sided (8.5x11), full colour brochure (8,000 packages)
- and/or a 6 page tri-fold (unfolded 25x8.5- double sided, full colour) brochure (12,000 packages)
- another letter (8.5x11, colour, single sided, not personalized) (6,000 packages)

Process

The SGBLS will provide electronic copies of the mailing lists (in excel format) with Word files of the letter (to be personalized), and pdf files of the brochures, and non-personalized letters.

The successful supplier will be responsible for the following deliverables:

1. Printing of all documents (including envelopes with logo)
2. Merging of mailing spreadsheet with letters so that they are personalized according to our specifications
3. Assembly of all packages
4. Delivery and mailing of all packages on September 3, 2010

Responsibilities, Study Deliverables, Proposal Content

Your proposal should include dates which materials should be provided to the supplier to ensure that the packages are all mailed on the date specified.

Timelines and Budget

The anticipated date for the execution of the contract with a successful proponent is August 16, 2010.

The desired date for commencement of work under the contract is August 16, 2010.

The packages will need to be ready for distribution in the mail by September 3, 2010.

Resource Availability

N/A

Selection Criteria

Proponents must demonstrate in their proposal that they have a clear understanding of the RFP requirements. Proponents need to articulate their proposals, intentions and expectations indicating how they will fulfill the requirements of the RFP and what services they will provide. The submitted RFP's will be reviewed in accordance the Authority's Purchasing Policy and Procedures. Evaluation criteria are subject to change if required by the Authority. Evaluation criteria used to evaluate proposals fall into the following categories:

Methodology

Specific technical guidelines and other criteria established by the various levels of governmental agencies restricts, to some degree, the level originality in all but unusual projects. As such, the corresponding score under methodology will reflect the Authority's interpretation of the suppliers' understanding and acknowledgement of the study objectives, the work involved in producing the results and the anticipated final project. Under this category, the Authority will encourage the supplier to suggest revisions, additional work, or any other items that may be required in addition to those specified in the terms of reference.

Corporate Experience

This category of ranking will allow for comparing the experience of each firm. Proposals should contain a listing of related studies completed by the supplier with a list of references that Authority staff may contact to complete a reference check.

Staff Allocations

Staffing allocation to a particular project is considered an extremely important factor towards satisfactory completion. Firms having specific expertise in related areas and corresponding support staff resources will be recognized under this category of the ranking system. Specific names of key personnel who will be involved in the project should be indicated, their resumes should be detailed in the proposal, and the percentage of their time to be spent on the project should be noted.

Scheduling

The ranking scores under this category will reflect the indicated efficiency of the proposed work schedule. The Authority requires projects to be completed on time and time allocations proposed for each specific work activity should be noted. Scheduling should be outlined in phases and indicated graphically. The Authority may require a penalty clause, in relation to scheduling, to be identified in the contract agreement.

Costs

It is the responsibility of public agencies to ensure that project allocated funds are utilized in the most cost effective manner and that the best product is obtained for monies spent. Estimated costs required to satisfactorily complete a study are therefore an important consideration in the selection of a consultant.

Cost estimates for a project are necessary:

- As an indicator for comparison purposes;
- For budget allocations; and
- To set out a payment schedule for specific work activities.

The supplier will identify their upset limit in their proposal.

General Terms and Conditions

Proposals are due and will be accepted no later than 4:00pm on August 9, 2010 at the Authority's Head Office, 120 Bayview Parkway, Newmarket, Ontario. Late responses will be unopened. Proposals, once received, will be date stamped and the time noted based on the Authority's clock. The receptionist will initial with the date and time that the proposal is received.

The Authority reserves the right to accept or decline any or all proposals and neither the lowest priced nor any proposal shall necessarily be accepted.

The Authority will not be liable for any costs incurred in the preparation of the proposal.

Provisions of the Conservation Authorities Act and Regulations, as amended shall supersede the terms and conditions of the Agreement.

Respondents must notify the Authority in writing that they have read and understood the proposal; such notification to be duly signed and dated by an authorized signing office of the firm, including the name of the signing office and position held.

All prices quoted shall itemize provincial and federal sales taxes. Although every effort will be made to outline all required work in the study terms of reference, the supplier may identify additional work and/or work alternatives which are outside the terms of reference. The additional work shall be clearly identified and indicated as a separate item in the cost estimates provided.

The supplier shall provide the following information:

- A profile of the firm, including examples of similar assignments and clients, resource and support services available and particular strengths relevant to the study or project.
- Experience of the consultant in this subject area with non-profit and public sector organizations.
- A description of the approach and techniques to be used.
- The location of the office responsible for the study or project and the names, and resumes, of the staff who will be assigned.
- The names of client officials who would act as contact references.
- An estimate of the number of hours required, broken down by level of staff assigned to each of the tasks.
- Fees and expenses.
- Scheduling and content for each phase of the study.

Subcontracting is discouraged, but if it is part of the proposal all information required of the principal supplier should be provided for any subcontracts.

Confidentiality of records and information concerning this project must be maintained at all times.

All correspondence, documentation and information provided by the Authority to any proponent in connection with this proposal process and/or the acceptance of any proposal remains the property of the Authority; must be treated as confidential; and must not be used for any purpose other than for submitting a proposal and for fulfillment of any resultant contract.

All correspondence, documentation and information provided to the Authority and its staff by every proponent in connection with, or arising out of, this proposal and the submission of any proposals become the property of the Authority and, as such, subject to the Municipal Freedom of Information and Protection

of Privacy Act (MFIPPA), as amended, and may be subject to release, pursuant to the Act. Proponents are reminded to identify in their proposal material, any specific proprietary or similar confidential information, the disclosure of which could cause them injury.

The successful proponent will be required to enter into a contract with the Authority meeting the expenditure limits and required terms and conditions as set by the Board of Directors of the Authority as well as being in form and content satisfactory to the Authority's legal counsel.

The successful proponent will not have the right to assign the contract nor any interest therein, nor subcontract the performance of any service or the supply of any project without the prior written consent of the Authority.

The contract will be governed by the laws of the Province of Ontario.

A proponent shall disclose to the Authority, in the proponent's proposal, any potential conflict of interest. If such a conflict of interest does exist, the Authority may, at its discretion, refuse to consider the proposal from the proponent, until the conflict matter is suitably resolved. If during the proposal evaluation process or the negotiation of the contract or execution of the work, the proponent is retained by or provides services for another client giving rise to a potential conflict of interest, then the proponent shall so inform the Authority, and if the Authority requests, refuse the new assignment or take such steps as are necessary to remove the conflict of interest concerned.

Two copies of the final report are required by August 9, 2010.

The successful proponent may be required to attend the N/A meeting of the Authority.