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Chair
Councillor Raymond Cho

Chief Executive Officer
John Tracogna

Chief Operating Officer
Robin D. Hale

2016-11-07

**REQUEST FOR PROPOSAL
BUILDING ASSET MANAGEMENT SYSTEM (WEB BASED)
RFP # 16 (2016-11)**

You are invited to submit a written proposal to provide professional services for building asset management software to manage all Toronto Zoo facility assets. The Toronto Zoo is seeking to implement a web-based stand-alone system (not integrated with financial system) that will provide a capital asset planning and management software application either hosted by the Toronto Zoo or the proponent. The software application must be capable of accepting all existing data from the 2015 Toronto Zoo Building Audit and information including engineering studies, hazardous material audits, air or water quality studies etc. in addition to and or in place of facilities assessment information provided by the Building Audit.

Proposal: Provide **four (4)** copies of your proposal, **one (1)** unbound signed and clearly marked as ORIGINAL and **three (3)** copies of the original proposal clearly marked as COPY and one (1) electronic copy (Microsoft Word or PDF) on a CD or flash drive in a sealed package or envelope. The original and all copies should be identical (excluding any obvious differences in labeling as noted above). Proposal to be delivered to the office of Purchasing & Supply, Toronto Zoo, Administrative Support Centre, 361A Old Finch Ave., Toronto, Ontario, M1B 5K7 by:

Due Date: **Wednesday, 2016-11-23, by 1200 hours (noon), local time**

Proposals shall remain in effect for a period of one hundred and twenty (120) days from the Proposal due date.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

If you have any queries regarding this request for proposal, please contact Mr. Peter Vasilopoulos, Supervisor of Purchasing & Supply at 416 392-5916 or pvasilopoulos@torontozoo.ca. If you require further technical details, please contact Leona Mitchell, Director of Facilities & Services at 416 392-5985 or lmitchell@torontozoo.ca.

Yours truly,

Robin D. Hale
Chief Operating Officer

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1.0 GENERAL TERMS

1.1 The following definitions will apply to this Request for Proposal and to any subsequent Contract:

- 1.1.1 “**Board**” means the Board of Management of the Toronto Zoo;
- 1.1.2 “**COO**” means the Chief Operating Officer of the Toronto Zoo;
- 1.1.3 “**Consultant**” means the person, partnership or corporation contracting with the Board to provide the required Services;
- 1.1.4 “**Contract**” means acceptance by the Toronto Zoo (by way of written acknowledgement, Agreement, Contract or Purchase Order) to furnish Services for money or other considerations;
- 1.1.5 “**Contract Price**” means the price payable under the contract to the Consultant, being the Proposal Price eventually accepted by the Board of Management of the Toronto Zoo subject to any changes pursuant to the Contract Requirements;
- 1.1.6 “**Commercial Off-The-Shelf (COTS)**” means features that are available as part of the solution immediately on installation and require no configuration or customization;
- 1.1.7 “**Proponent**” means an individual or company that submits or intends to submit, a proposal in response to this Request for Proposal;
- 1.1.8 “**Proposal Price**”, “**Contract**” and “**Contract Documents**” have the meanings set out therefore in clauses contained in these documents;

1.1.9 **Request for Proposal (RFP)**” means the RFP document in its entirety, inclusive of any addenda that may be issued by the Toronto Zoo;

1.1.10 **“Services” or “Work”** means everything that is necessary to be performed, furnished delivered by the Consultant to meet the Consultant’s obligation under this Contract;

2.0 DESCRIPTION AND SCOPE OF PROJECT

The Toronto Zoo is seeking to implement a web-based stand-alone solution (not integrated with financial system) that will provide a capital asset planning and management software application either hosted by the Toronto Zoo or the proponent. The software application must be capable of accepting all existing data from the 2015 Toronto Zoo Building Audit and information including engineering studies, hazardous material audits, air or water quality studies etc. in addition to and or in place of facilities assessment information provided by the Building Audit.

2.1 Consultants will conduct interviews with key Zoo resource staff to gain an understanding of users service requirements and current facility related matters.

2.2 Existing site drawings at the Toronto Zoo are for review and site familiarization only. Background information provided by the Zoo is for general reference.

2.3 Upon award of the contract, the selected Consultant will enter into an agreement for Asset Management Software with the Zoo by purchase order or contract incorporating the terms and conditions of the Request for Proposal and the Proponent proposal, as determined by the Zoo.

3.0 CONSULTANT SERVICES DELIVERABLES TO BE PROVIDED

Objectives

In general the objectives of the proposed project are as follows:

The Proponent shall provide an Assessment Application for Capital Planning and Management that meets the following functional, non-functional, and technical requirements. The Application should be a Commercial Off-The-Shelf (COTS) application that is easily configurable through an easy to use web interface.

3.1 Data Ownership³³

3.1.1 The Toronto Zoo will own all of the data that is entered into the Assessment Application.

3.2 Licensed Users

3.2.1 The Proponent’s Application must be accessible to selected users throughout the Toronto Zoo.

3.2.2 The Toronto Zoo requires nine (9) Application users.

a) Two users will be “super users” requiring full training and all administrative and read-write privileges.

b) Two users will be “standard users” requiring full training and read-write privileges.

c) Five users will be “read only users” requiring minimal training and read-only privileges.

3.2.3 Read-write privileges will allow the user to access and search authorized data in the Application; add, modify and delete field data and records; and generate standard, ad-hoc, and what-if scenario reports.

3.2.4 Read-only privileges will allow the user to access and search the Application, and generate standard, ad-hoc, and what-if scenario reports.

3.3 Hosting and Administering

The Proponent will:

3.3.1 Perform data and system integrity checks by taking all necessary steps to ensure, at a minimum, the Assessment data does not become corrupted and that reporting and modeling results are accurate.

3.3.2 Administer user access and passwords by configuring, adding, deleting, and modifying user access to the Application as instructed by the Toronto Zoo.

3.3.3 Administer field names and drop-down values and tables as instructed by the Toronto Zoo.

3.3.4 Develop, test, and deploy new reports. Specific new reports are outside the scope of this Contract and will be specified separately with the Proponent.

3.3.5 The software should be available for a minimum of fifteen (15) years.

3.3.6 Ensure that all users are using the most current release of the Application, with all known patches applied including the annual update of the Application's costing component or module.

3.3.7 Advise all users of all database configuration adjustments

3.3.8 Ensure the security of all backend data.

3.3.9 A price for annual database hosting and maintenance fees should be included with your submission.

3.4 Training

3.4.1 Train all identified users.

3.4.2 Provide all trained users with access to user manuals, reference cards, etc.

3.4.3 Re-train all previously trained users when new upgrades or releases with significant changes are implemented.

3.4.4 Provide training prepared for the two types of users: read-write users and read-only users.

The proponent must provide a fixed price for conducting all training based on the requirements above and for the number of expected users identified previously. If training is included in the software licensing fee, please make that fact clear.

3.5 Technical Support

3.5.1 The Toronto Zoo requires User support throughout the duration of the Agreement which includes assisting trained Application users on how to use the Application and resolving Application related problems. The Supplier must provide this as telephone support between the hours of 8:00 a.m. and 4:00 p.m., ET (Eastern Time), Monday through Friday, excluding statutory holidays. They must also provide an e-mail address for similar user requests, questions, or problems.

3.6 Functional Requirements

3.6.1 Building Components Classification

a) The Application will classify a Site or Building Components according to Uniformat II or equivalent, as deemed acceptable by the Toronto Zoo;

b) The Application will classify components and subcomponents down to Level 3 of the Uniformat II elemental classification system, or equivalent depth of classification for alternate classification systems; and

3.6.2 Data Management / Manipulation

a) Be able to record condition evaluations for all buildings and site improvements (i.e. parking area, light standards, signs, kiosks) at a site;

b) Be structured to hold data or generate reports on:

i. sub-elements, elements, or complete components, etc.;

- ii. an entire specific Facility on the Site;
- iii. all Facilities on the Site;
- iv. all Facilities of a specific type (i.e. Pavilion, Service, Animal Holding);
- c) Hold all assessment data including, but not limited to, the following:
 - i. Facility, Site, component, and sub-component data;
 - ii. Building Profile Data;
 - iii. Facility Overview information;
 - iv. Requirements and Recommended actions data;
 - v. Cost estimates and supporting data
- d) Hold the User defined projects setup based on grouping of Requirements/Recommended actions into a single project;
- e) Be able to group and/or link multiple deficiencies to one (1) recommendation. (Example: Group a chiller deficiency, a cooling tower deficiency, and circulation pump deficiency in a Building into a single proposed project, or group multiple-Buildings' window replacements on a campus into a single proposed project);
- f) Have the ability to attach digital photos, drawings, engineering studies, hazardous material audits, air or water quality studies, reference documents, tables, etc. at the Facility, Site, component, sub-component, or project recommendation level as required. The Application will be capable of attaching multiple documents to a single project record or single asset (e.g. Building);
- g) Ability to add notes in the facility profile data for any asset;
- h) Ability to search, filter and sort data by any criteria as well as by single or multiple criteria;
- i) Ability to export data to excel spreadsheet;
- j) Ability to archive data (i.e. decommissioned assets, completed requirements or projects);
- k) Ability to change status of requirements to completed

3.6.3 Data Analysis and Modelling

- a) FCI Calculation
 - i. Ability to calculate an FCI at a building, zoogeographic region or asset type based on the Toronto Zoo definition of the FCI of:

$$FCI = \frac{\text{Deferred Maintenance costs} + \text{Renewal costs}}{\text{Current Replacement Cost of Building}}$$
 - ii. Renewal costs will include current and future costs as identified in the Requirements. The future timeframe will be user selectable from 1 to 5 years in 1 year increments.
 - iii. Deferred maintenance and renewal costs will include facility and site requirements but the FCI calculation should be capable of excluding or including repairs to site components.
- b) Ability to support life-cycle analysis for forecasting long-term capital repair costs. The Application will need to accept repetitive major system renewals based on pre-defined or user-defined life-cycle intervals and associated costing.
- c) Ability to model the impact of different funding levels on the FCI as well as be able to model the impact of potential projects on the FCI. This ability must be available for a single Facility or Site, portfolio-wide, or any selected subset of assets.
- d) Ability to create user defined metrics for monitoring and reporting of Key Performance Indicators.
- e) Ability to automatically update FCI when User changes status of a requirement(s) to completed.

3.6.4 Capital Planning

- a) Capable of generating multiple-year capital repair plans (number of years to be user-defined between 1 and 20 years) for a given asset or group of assets, based on data entered from Building Condition Assessments.
- b) Ability to generate capital repair plans from any combination of user-selected criteria.

3.6.5 Cost Estimates

The Application's costing function:

- a) Must be updated annually including inflation rates if applicable;
- b) Allow entry of user defined cost adjustment factors to account for special circumstances;
- c) Allow user defined estimated costs to be generated automatically by the Application or manually entered and allow entry of cost adjustment factors;
- d) Be capable of spreading costs over several years to accommodate studies or phased work;
- e) Automatically update costs that are developed using the costing system. The Application will also be able to automatically update manually entered costs using either a costing-system-supplied inflation figure, or a user-supplied inflation figure; and
- f) Generate the replacement cost of a Building and will be defined by the Building type and a cost model.

3.6.6 User Web Interface

- a) Provide an intuitive, user friendly interface that is well laid out using multiple windows, tabs and other means to display as much related information as possible
- b) Easy to navigate format with which minimizes the number of steps to obtain information
- c) Provide standard dashboard views and ability to customize dashboards
- d) Configurable dashboard that allows users to select pre-configured or blank layout and construct a dashboard by selecting, sizing and placing pre-defined components (widgets) to setup a user defined dashboards.
- e) Ability to drill down within the dashboard
- f) Ability to display information in a tabular or graphical format
- g) Ability to set shortcuts to favorites (i.e. reports or dashboards)
- h) Ability to search, filter and sort by any criteria and by single or multiple criteria
- i) Ability to view facility assessment data at a component, facility, group of facilities or portfolio level

3.6.7 User Defined Projects

- a) Ability to group requirements from one or more facilities into a single project.
- b) Capable of being modified to accept the definitions unique to the Toronto Zoo and to allow the tables to be modified (i.e., modify an existing row, add a new row, or delete an existing row) over time.
- c) Ability to manually set overall project budget.
- d) Ability to change status of projects to completed, enter actual costs, completion dates and notes. Once completed, requirements in the project are shown as complete and FCI is automatically updated.

3.6.8 Reporting

- a) The Application will allow authorized users to generate standard, custom, ad hoc, configurable and "what-if" scenario reports.
- b) Ability to produce graphical and / or chart-formatted reports that provide information such as multi-year cost data.

- c) Ability to run graphic reports with or without their respective photographs and / or drawings.
- d) Ability to provide summary and detailed versions of Building condition reports and other lengthy reports.
- e) Application generated reports will be formatted to standard paper sizes and be provided with a font size that is easy to read.
- f) Ability for User to generate reports directly from the Application in Adobe Portable Document Format (PDF) format, as well as in Microsoft Excel spreadsheet format, as required.
- g) Ability to perform batch reporting
- h) Capable of producing standard, preformatted reports as well as user defined (customizable) reports, with the reported data filtered by a variety of parameters that form part of a Building profile. This capability includes creating one-off (i.e., ad hoc) reports designed to answer a specific question, identify a unique need, or verify a trend.
- i) Ability for User to generate reports including, but not limited to, the following:
 - i. preformatted Facility Condition Assessment report generated with information entered into the Application;
 - ii. preformatted FCI report at various levels of the organization including:
 - facility (single);
 - facilities (all Facilities on the site);
 - facilities in a zoogeographic region (i.e. African Savanna); and
 - iii. preformatted scenario modeling reports, showing or comparing trends, such as Building condition versus funding over time, FCI versus funding over time, funding required to maintain FCI over time, Deferred Maintenance versus funding over time, etc.
 - iv. other preformatted reports might include:
 - reports of recommended studies and placeholder reports
 - reports by classification (e.g. Priority 1 through 5)
 - reports by system (e.g., all roofing at all Buildings, all elevators, etc.)
 - reports by year
 - reports by cost
- j) Report editor capability that allows users to select pre-configured or blank layout and construct a report by selecting, sizing and placing pre-defined components (widgets) to setup a fully configurable report. Ability to save report as a user defined report.
- k) Ability to add user defined metrics to reports
- l) Ability to provide audit logs to report on changes made within the system, when and by which user.

3.6.9 Ranking

The application shall provide a methodology for ranking all capital needs and applying multi-year budgets to define an annual capital spending plan.

The application shall have the ability to analyze and rank all capital needs across the entire portfolio or any subset thereof through the following:

- a) Be able to capture the overall organization's priorities. There should be an understanding of how various metrics relate to each other, such as how important life safety issues are to building use, and so forth. The system should be able to rank any and all variables that are associated with assets, systems, specific needs, etc.

- b) Be able to define one or more approaches to the ranking priorities, thus allowing for different approaches to be applied to different aspects of the portfolio.
- c) Be able to define budgets over multiple years based on a number of different criteria, such as an entered amount, a projected (extrapolated) amount, or a percentage of the total current replacement value. The system should allow multiple budgets to be defined.
- d) Rank all capital needs based upon the defined priorities and apply the defined budgets to create an annual capital spending plan.
- e) Be able to uniquely identify each Requirement so it can be selected, reported on, and acted on within the Assessment Application.

3.7 Non-Functional Requirements

The Application must be proven in similar environments with at least three (3) years of successful operations and meet the non-functional requirements.

3.7.1 Data Entry

- a) The Building Audit data input is to be completed by the successful proponent.

3.7.2 Availability

- a) Be accessible to users across the Toronto Zoo via a secure, encrypted, web-enabled interface that uses a standard browser.
- b) Be compatible with existing Toronto Zoo software and operating systems.

3.7.3 Usability

- a) Use a Graphical User Interface;
- b) Have an online help feature,
- c) Have error messages that can be understood by users and that suggest remedies to the problem that is encountered.

3.7.4 Capacity

- a) Be able to store and manipulate all of the Assessment and Assessment related data (e.g., Building profile Data, attached documents, digital photographs, etc.) specified in this Scope of Work.

3.7.5 Scalability

The Application must be able to accommodate (i.e., be “scalable”):

- a) All types of Facilities that the Toronto Zoo has;
- b) Increased amounts of building profile and Assessment data; and
- c) Be capable of handling up to 150 or more assets in total to allow future addition of other assets.

3.7.6 Data Security

- a) Access Control

The Proponent will ensure that industry best practices for managing data access and control are used.

- b) Vendor Security / Backup Processes

The Proponent must:

- i. Make their security policies and processes available to the Toronto Zoo as requested;
- ii. Allow for a periodic review of the privacy and security contractual provisions to ensure they continue to be sufficient.
- c) Confidentiality and Security

- i. The Proponent will ensure that best practices for backup and disaster recovery are used.

3.8 Administrative

- 3.8.1 Consultant to attend and take minutes at all meetings, other site, facility and program reviews, and special meetings as required throughout the duration of the project.
- 3.8.2 Consultant to co-ordinate and liaise with all sub-consultants and others as necessary making sure all relevant issues have been raised and concluded.
- 3.8.3 Arrangement of special consultants, additional work to the Services, and similar costs to be the responsibility of the Consultant, are to be identified and included as direct disbursements in your Fee Proposal. Special advisors/resource experts recommended by the Consultant and approved by the Zoo will be integrated into the meetings/discussions and paid from disbursements.
- 3.8.4 Disbursements including, but not limited to, reproduction, postage, courier, fax machine, long-distance telephone calls, printing of drawings and specification, data processing and photographic production, renderings, models and mock-ups as required, surveys, any permits and applications. Photocopies of receipts must be provided when claiming for disbursements.
- 3.8.5 Preparation of all software and other final products for the project as necessary.
- 3.8.6 The Consultant is to work within specified budget limitations and be responsible for all work necessary to ensure conformance to budget, which includes the cost of consultant fees, design and final report documents, disbursements, etc.
- 3.8.7 Where there is a change to the scope of the project, the Consultant will provide an estimate of the costs of the changed items for approval prior to undertaking the additional work.
- 3.8.8 Direct assistance and liaison of Consultant with Zoo Facilities & Services staff. The Consultant will liaise with Zoo staff throughout the project regarding audit methodology, site access, and to review the audit reports and recommendations.

4.0 PROPONENT SUBMISSION REQUIREMENTS

- 4.1 Title page showing request for Proposal Proponent's name.
- 4.2 Duly executed proposal form.
- 4.3 Indicate the individual or incorporated name of the Proponent (i.e. the prime Consultant); address(es); telephone and fax number(s); and name of key contact person(s).
- 4.4 The Proponent must provide names and company information for all Sub-consultants required by Consultant.
- 4.5 State the scope and limits of responsibility of the Consultant and Sub-consultants named in the team.

- 4.6 Provide a schedule or chart of the proposed tasks, hours and the hourly rates for each person associated with this project.
- 4.7 The Proponent must confirm compliance with the Insurance and Indemnification provisions identified in Section 4.0.
- 4.8 Clearly articulate key personnel to be involved with the project and their responsibilities. Indicate the qualifications and experience (beyond a general resume), that each member will bring to the team and include a breakdown on the number of hours each will devote to the Project and their hourly billing rate. Indicate the total extent of availability of all team members throughout entire Feasibility Study period.
- 4.9 Provide the name, location, client reference and brief description of not more than five (5) similar studies under the direct responsibility of the persons or team named above.
- 4.10 Clearly indicate how the project will be managed.
- 4.11 Guarantee project start immediately following successful confirmation of award of the project, and work to implementation and completion schedule.
- 4.12 Provide **four (4)** copies of your proposal, **one (1)** unbound signed and clearly marked as ORIGINAL and **three (3)** copies of the original proposal clearly marked as COPY and one (1) electronic copy (Microsoft Word or PDF) on a CD or flash drive in a sealed package or envelope. The original and all copies should be identical (excluding any obvious differences in labeling as noted above). Proposal to be delivered to the office of Purchasing & Supply, Toronto Zoo, Administrative Support Centre, 361A Old Finch Ave., Toronto, Ontario, M1B 5K7 by **Wednesday, 2016-11-23, 1200 hours (noon) local time.**

5.0 **PROPONENT FEE PROPOSAL**

- 5.1 On the Fee Proposal Form (Appendix II), provide an upset fee limit for the Building Asset Management Software inclusive of disbursements, plus HST as follows:
 - **Web-based software provision and initial consulting fees for set up.**
 - **Maintenance costs, annually**
 - **Data input costs, hourly**
 - **Ability to link AutoCAD drawing (floor plan) for each building (provide separate price)**
 - **Disbursements**

All Consultant and Sub-consultants costs for research, specifications, models, and similar costs to be the responsibility of the Consultant, identified and included as part of the fees in the Fee Proposal.

- 5.2 Provide hourly rates for other services which may be requested during completion of the project.
- 5.3 Proposal prices shall remain in effect for a period of ninety (90) days from the proposal due date of 2016-06-03.
- 5.4 The Proponent shall bear all costs and expenses with respect to the preparation and submission of its Proposal and the bidder participation in the proposal process (the "Proposal Costs"), including but not limited to: site visits and inspections, all information gathering processes, interviews,

preparing responses to questions or requests for clarification from the Board, preparation of questions for the Board, and contract discussions and negotiations.

6.0 PROPOSAL EVALUATION AND SELECTION

6.1 The Proponent is urged to ensure that its Proposal is submitted in the most favourable terms in order to reflect the best possible potential, since less than best potential could result in exclusion of the Proposal from further consideration.

6.2 The Agreement will not be awarded to the Proposal with the lowest cost, but rather, award shall be based on an evaluation of the Consulting team’s expertise, prior project experience, proposed methodology, and price. Additionally, the Zoo may accept or reject any part of the Proponent’s bid.

6.3 An Evaluation Team comprised of representatives designated by the Zoo will evaluate responses to the RFP.

6.4 There are three steps to the pre-defined evaluation process:

- Step 1 – Initial Review of Responses
- Step 2 – Evaluation of Submitted Proposals
- Step 3 – Evaluation of Presentations

6.5 Step 1 – Initial Review of Responses

The Zoo will open only those Proposals received by the Proposal Deadline and time specified within this RFP. Immediately upon opening, the Zoo will review each Proposal for compliance with the instructions and conditions applicable to this RFP. The Zoo, at its option, may seek Proponent retraction and clarification of any discrepancy/contradiction found during its review of Proposals.

6.6 Step 2 – Evaluation of Submitted Proposals

6.6.1 The Evaluation Team will evaluate each submitted Proposal, that has passed through Step 1, on criteria that will include, but not necessarily be limited to, the following:

Evaluation Criteria	Points
Depth and breadth of the Project team’s relevant qualifications and experience with similar scale and type of projects	25
Depth and breadth of the team Lead’s relevant qualifications and experience	20
Commitment to complete work according to schedule of events in section 8.0 within the RFP	10
Availability of team members during entire project	10
Understanding of project scope of work	10
Details on the general approach and methodology that proponent would take in performing the services outlined within the RFP	10
Fee Proposal	15

6.6.2 The Zoo may, at its discretion, eliminate a Proposal from further consideration if it deems the overall cost to be prohibitive.

6.6.3 A short-list of suitable Proponents may be established who may be invited to Step 3 to provide presentations related to their Proposal.

6.7 Step 3 – Evaluation of Presentations (If Required)

6.7.1 Invited Proponent(s) shall provide presentations in support of their Proposals or to demonstrate or otherwise expand on the information contained therein.

6.7.2 The Proponent(s) shall ensure that the presentation is made by well versed staff with the authority to make decisions and commitments on behalf of the Proponent.

6.7.3 Any and all costs incurred by the Proponent in order to prepare for and attend the presentation and/or demonstration including transportation, food, lodging, etc. shall be borne entirely by the Proponent.

6.8 The final score is then calculated as illustrated in the following table:

Evaluation	Score
Step 1 – Initial Review of Submitted Proposals	Prerequisite
Step 2 – Evaluation of Submitted Proposals	Maximum 100
Step 3 – Evaluation of Presentations (If Required)	(Maximum 50 If Required)
Total maximum score excluding Presentation	100
Total maximum score including Presentation	150

6.9 By responding to this Proposal, the Proponent agrees to accept the recommendation of the Evaluation Team as final.

6.10 All Proposals shall be submitted by the Proponent on the understanding that the Proposals shall become the property of the Zoo.

7.0 SCHEDULE OF EVENTS

The following is a tentative schedule for the Building Asset Management Software process. The final schedule will be developed jointly with the successful proponent in the first week of project execution:

Pre-Award	
Release of RFP	2016-11-07
Proponents' Question Deadline	2016-11-14
Submission Due	2016-11-23
Interviews, if necessary	Week of 2016-11-28
Notification of Award By the Toronto Zoo	2016-11-28
Post-Award	
Commencement of Work	2016-12-05
Testing	2016-08-19
Implementation and sign off	2016-09-30

The RFP process and project will be governed according to the above schedule or other schedule provided by the Consultant and approved by the COO of the Toronto Zoo. Although every attempt will be made to meet all dates listed, the Toronto Zoo reserves the right to modify any or all dates at its sole discretion. Appropriate notice of change will be provided, in writing, as soon as is feasible so that each Proponent will be given the same non-preferential treatment.

8.0 PROPOSAL TERMS AND PROVISIONS

The successful Proponent shall be retained through a contractual agreement and/or a purchase order, which includes the terms and conditions of this Request for Proposal.

8.1 Consultant's Liability and Indemnity

The Consultant will from time to time at all times hereafter well and truly save, defend and keep harmless and fully indemnify the Board, the City of Toronto, and the Toronto and Region Conservation Authority and each of their officers, employees and agents (hereinafter called the "Toronto Indemnities") of, from and against all manner of action, suits, claims, executions and demands which may be brought against or made upon the Toronto Indemnities or any of them and of, from and against all loss, costs, charges, damages, liens and expenses which may be sustained, incurred or paid by the Toronto Indemnities, their officers, employees and agents or any of them by reason of or on account of or in consequence of the execution of this agreement or provision of the business or any other work or matter to be carried out or performed by the Proponent with respect to the Request for Proposal or any agreement that may result from the request for proposal process, and/or the non-execution or imperfect or improper execution thereof and will pay to the Toronto Indemnities on demand any loss, costs, damages and expenses which may be sustained, incurred or paid by the Toronto Indemnities or any of them in consequence of any such action, suit, claim, lien, execution or demand and any monies paid or payable by the Toronto Indemnities or any of them in settlement or discharge on account thereof.

The Consultant shall be responsible for any and all damages, or claims for damages for injuries or accidents done or caused by his or her employees, or resulting from the prosecution of the Work, or any of their operations, or caused by reason of the existence of location or condition of the works, or of any materials, plant or machinery used thereon or therein, or which may happen by reason thereof, or arising from any failure, neglect or omission on their part, or on the part of any of their employees to do or perform any or all of the several acts or things required to be done by him or them under and by these General Conditions, and covenants and agrees to hold the Board, the Toronto and Region Conservation Authority and the City of Toronto, their officers, agents, employees, Consultants and invitees harmless and indemnified for all such damages and claims for damage; and in case of the Consultant's failure, neglect or omission to observe and perform faithfully and strictly, all the provisions of the Work, the COO may, either with or without notice (except where in these Contract Requirements, notice is specially provided for, and then upon giving the notice therein provided for), take such steps, procure such material, plant trucks and men, and do such work or things as he/she may deem advisable toward carrying out and enforcing the same and any such action by the COO as he is herein empowered to take, shall not in any way relieve the Consultant or his/her surety from any liability under the Contract.

8.2 Insurance and Policies

Provide minimum \$2,000,000 Commercial Liability Insurance in respect of injury or death to a single person or for property damage in a manner satisfactory to the Chief Operating Officer must be maintained through the Project and included in the Fee Proposal.

Standard automobile liability insurance for all owned vehicles with limits of not less than Two Million Dollars (\$2,000,000.00) per occurrence.

Professional liability insurance (errors and omissions) with limits of not less than Two Million Dollars (\$2,000,000.00) per occurrence.

All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the Chief Operating Officer.

All policies of insurance required to be taken out by the Consultant shall be placed with insurers licensed to conduct business in the Province of Ontario and shall be subject to the approval of the COO, acting reasonably.

The Successful firm shall deliver to the Board evidence of the insurance required prior to the commencement of the agreement, in form and detail satisfactory to the CEO acting reasonably.

All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the COO.

The provisions of this section shall no way limit the requirements and obligations imposed on the successful firm elsewhere in the Contract, nor relieve the Consultant from compliance therewith and fulfillment thereof.

The parties agree that insurance policies may be subject to deductible amounts, which deductible amounts shall be borne by the Contract

The Consultant shall, as applicable, conform to and enforce strict compliance with the Occupational Health and Safety Act and for purposes of the Act be designated as the "constructor" for the Service.

The Consultant must adhere to all relevant Zoo policies, including, but not limited to, the Contractor Safety Policy, Working in the Vicinity of Animal Containments Policy and the Vehicles on Site Policy, copies of which the Chief Operating Officer, Toronto Zoo, shall supply to the Consultant

8.3 **Incurred costs**

The Proponent shall bear all costs and expenses with respect to the preparation and submission of its Proposal and the Proponent's participation in the proposal process (the "Proposal Costs"), including but not limited to: all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board and contract discussions and negotiations.

The Toronto Zoo shall not be responsible for or liable to pay any Proposal Costs of any Proponent regardless of the conduct or outcome of the Proposal Request, Purchase Order process, or Contract process.

The RFP does not constitute an offer or tender by the Toronto Zoo. Receipt of Proposals by the Toronto Zoo pursuant to this RFP or selection or notification confers no rights under any Proposal nor obligates the Toronto Zoo in any manner whatsoever.

8.4 **Liability of Errors**

While the Toronto Zoo has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is

supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Toronto Zoo, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

8.5 **Toronto Zoo Rights and Options Reserved:**

The Toronto Zoo reserves the right to award the contract to any proponent who will best serve the interest of the Toronto Zoo. The Toronto Zoo reserves the right, in its sole discretion, to exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- (a) To reject any or all proposals.
- (b) To re-issue this RFP at any time prior to award of work.
- (c) To cancel this RFP with or without issuing another RFP.
- (d) To supplement, amend, substitute or otherwise modify this RFP at any time prior to the selection of one or more proponents for negotiation.
- (e) To accept or reject any or all of the items in any proposal and award the work in whole or in part.
- (f) To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements.
- (g) To permit or reject at the Toronto Zoo's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the proponents following proposal submission.
- (h) To request that some or all of the proponents modify proposals based upon the Toronto Zoo's review and evaluation.
- (i) To request additional or clarifying information or more detailed information from any Proponent at any time, before or after proposal submission, including information inadvertently omitted by the proponent.

8.6 **Cancellation**

Nothing herein shall be construed as giving the Proponent the right to perform the services contemplated under this agreement beyond the time when such services become unsatisfactory to the Toronto Zoo; and in the event that the Proponent shall be discharged before all the services contemplated hereunder have been completed or the services are for any reason terminated, stopped or discontinued because of the inability of the Proponent to serve under this agreement, the Proponent shall be paid only for the portion of the work which shall have been satisfactorily completed at the time of termination.

8.7 **Ownership and Confidentiality of Board-Provided Data**

All correspondence, documentation and information provided by the Toronto Zoo staff to any bidder or prospective Bidder in connection with, or arising out of this RFP, the services or acceptance of the RFP:

- 8.7.1 is and shall remain the property of the Board;
- 8.7.2 must be treated by Proponents and Prospective Proponents as confidential;
- 8.7.3 must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent agreement.

8.8 **Copyright:**

The final product and related materials from the work is to be for the exclusive use of the Toronto Zoo. The Toronto Zoo shall be the only and sole owner of the product and related materials for the sole and unfettered use by the Toronto Zoo. Upon payment of the said product and related materials by the Toronto Zoo, the successful bidder shall have no hold, proprietary claim, ownership, use of any

kind, intellectual or otherwise nor shall there be any restrictions placed on the final product and related products by the successful bidder. By submitting a Proposal in this response to this RFP, the Bidder shall thereby acknowledge and agree that the Toronto Zoo has exclusive ownership and sole and unfettered use of this final product and related products.

8.9 **Ownership and Disclosure of Proposal Documentation**

The documentation composing any Proposal submitted in response to this RFP, along with all correspondence, documentation and information provided to the Toronto Zoo by any Bidder in connection with, or arising of this RFP, once received by the Toronto Zoo:

- 8.9.1 Shall become property of the Toronto Zoo and may be appended to purchase order issued to the successful Bidder;
- 8.9.2 Shall be come subject to the Municipal *Freedom of Information and Protection of Privacy Act* (“*MFIPPA*”) and may be released pursuant to that Act

Because of *MFIPPA*, prospective Bidders are advised to identify in their Proposal material any scientific, technical, commercial, proprietary or similar confidential information, the disclosure of which could cause them injury.

Each Bidder’s name shall be made public. Proposals will be made available to member of the Board on a confidential basis and may be released to members of the public pursuant to *MFIPPA*.

8.10 **Conflict of Interest Statement**

In its Proposal, the Proponent must disclose to the Toronto Zoo any potential conflict of interest that might comprise the performance of the Work. If such a conflict of interest does exist, the Toronto Zoo may, at its discretion, refuse to consider the Proposal.

The Proponent must also disclose whether it is aware of any Toronto Zoo employee, member of board, agency or commission or employee thereof having a financial interest in the Proponent and the nature of that interest. If such an interest exists or arises during the evaluation process or the negotiation of the Agreement, the Toronto Zoo may, at its discretion, refuse to consider the Proposal or withhold the awarding of any agreement to the Proponent until the matter is resolved to the Toronto Zoo’s sole satisfaction.

Proponents are cautioned that the acceptance of their Proposal may preclude them from participating as a Proponent in subsequent projects where a conflict of interest may arise. The Consultant(s) for this project may participate in subsequent/other Toronto Zoo projects provided the Consultant(s) has (have) satisfied pre-qualification requirement of the Toronto Zoo, if any and in the opinion of the Toronto Zoo, no conflict of interest would adversely affect the performance and successful completion of an Agreement by the Consultant(s).

If, during the Proposal evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to potential conflict of interest, then the Proponent will so inform the Toronto Zoo. If the Toronto Zoo requests, then the Proponent will refuse the new assignment or will take steps as are necessary to remove the conflict of interest concerned.

8.11 **No Collusion**

A proponent shall not discuss or communicate, directly or indirectly, with any other Proponent or their agent or representative about the preparation of the Proposals, Each proponent shall attest by virtue of signing the Proposal Submission Form that its participation in the RFP process is conducted without any collusion or fraud. If the Toronto Zoo discovers there has been a breach of this requirement at any time, the Toronto Zoo reserves the right to disqualify the Proposal or terminate any ensuing Agreement.

8.12 Education Institute Status

The Toronto Zoo is a registered educational institute and accordingly may be eligible for preferred pricing which should be reflected in the Tender as submitted

8.13 Charity Status

The Toronto Zoo is a registered charitable organization (registration #BN 119216398RR0001) and accordingly may be eligible for preferred pricing which should be reflected in the Quotation as submitted.

8.14 Governing Law

This RFP and any quotation submitted in response to it and the process contemplated by this RFP including any ensuing Agreement shall be governed by the laws of the Province of Ontario. Any dispute arising out of this RFP or this RFP process will be determined by a court of competent jurisdiction in the Province of Ontario

9.0 PROPOSAL FORM

The undersigned Proponent having reviewed and fully understood the RFP and all terms and requirements of the RFP and all terms and conditions of the RFP and information provided, hereby submits the attached Proposal and supporting materials (“the Proposal”) in accordance.

I/We, hereby, have received, allowed for and included as part of our submission all issued Addendum numbered _____.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

By submitting a Proposal the Proponent agrees to all of the terms and conditions of this Request for Proposal.

By signing and submitting this proposal, you are agreeing to the release of your proposal information, as deemed necessary by the Board, in order to conduct business associated with this proposal or project.

COMPANY INFORMATION	
Company Name:	
Name of authorized Signing Officer	Title:
Signature:	Date:
Contact Name:	Title:
Address:	
Telephone #:	Fax #:
Email:	Web Site:
HST #:	

DISCOUNT	Discount	Days
Discount allowed for prompt payment and period within which invoice must be paid to qualify.	%	

SUBMISSION LABEL

This address label should be printed and affixed to the front of your sealed tender, quotation and proposal envelope/package submission. Toronto Zoo will not be held responsible for envelopes and packages that are not properly labeled or submitted to an address other than the one listed on this label.

Proponent Name _____

RFP 16 (2016-11)- BUILDING ASSET MANAGEMENT SYSTEM (WEB BASED)
Closing: Wednesday, 2016-11-23, 12:00 hours (noon) local time

TO BE RETURNED TO

**TORONTO ZOO
C/O SUPERVISOR, PURCHASING & SUPPLY
ADMINISTRATIVE SUPPORT CENTRE
361A OLD FINCH AVE.
TORONTO, ONTARIO
M1B 5K7**

NOTICE OF NO BID

INSTRUCTIONS:

It is important to the Toronto Zoo to receive a reply from all invited bidders. If you are unable, or do not wish to submit a bid, please complete the following portions of this form. State your reason for not bidding by checking the applicable box(es) or by explaining briefly in the space provided. It is not necessary to return any other Request for Proposal/Quotation/Tender documents or forms. Please just return this completed form by fax or by mail prior to the official closing date. Purchasing and Supply Fax Number: (416) 392-6711.

A Proposal/Quotation/Tender is not submitted for the following reason(s):			
<input type="checkbox"/>	Project/quantity too large.	<input type="checkbox"/>	Project/quantity too small.
<input type="checkbox"/>	We do not offer services or commodities to these requirements	<input type="checkbox"/>	Cannot meet delivery or completion requirement
<input type="checkbox"/>	We do not offer this service or commodity.	<input type="checkbox"/>	Agreements with other company do not permit us to sell directly.
<input type="checkbox"/>	Cannot handle due to present commitments.	<input type="checkbox"/>	Licensing restrictions
<input type="checkbox"/>	Unable to bid competitively.	<input type="checkbox"/>	We do not wish to bid on this service or commodity in the future.
<input type="checkbox"/>	Insufficient information to prepare quote/proposal/tender	<input type="checkbox"/>	Specifications are not sufficiently defined
<input type="checkbox"/>	We are unable to meet bonding or insurance requirements.	<input type="checkbox"/>	

<u>Other reasons or additional comments (please explain):</u>

Company Name:	
Address	
Contact Person:	
Signature of Company Representative:	
Date:	
Phone Number:	
Email address	
Fax Number:	

Facilities & Services
Building Inventory
2016-05-20

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N
	<u>MAIN GATE AREA</u>				
FA0000	Bald Eagle Holding	150	14	1974	N
VS0000	Member & Guest Centre (incl. Generators, Washrooms, Storage Area)	9,500	883	1974	partial
VS1000	Greenhouse Giftshop	1730	161	1986	N
VS0600	Peacock Café/Tim Hortons				Y
ZS0000	Education/Retail Centre	13,000	1208	1986	Y
	<u>DISCOVERY ZONE</u>				
CZ0000	Bird Barn Holding	1760	164	1988	N
DZ0200	Splash Island Change/Mechanical	1705	158	2002/11	Partial
DZ0300	Washrooms	1330	124	2003	Y
DZ0400	Waterside Holding	1140	106	2003	N
DZ0800	Goat & Pig Holding	290	27	2003	N
EC0000	Portable Classroom	1,765	164	2003	Y
	<u>INDO-MALAYA</u>				
IN0000	Indo-Malaya Pavilion	28,800	2676	1974	Y
IN4300	Trailer, Supervisor Office	150	14		N
IR0000	Indian Rhino Holding	7,200	669	1981	Y
IP0100	Himalayan Tahr Holding	384	36		Y
MW0000	Malayan Woods Pavilion	5,000	465	1974	Y
MO0000	Conservation Connection Centre	1,000	93	1974	Y
IP0300	Lion-Tailed Macaque Holding	1,100	102	1974	partial
IP0400	Gaur 1/Gaur 2 Holding	3,350	311	1980	partial
IN1700	Sumatran Tiger Holding	645	60	1984/02	N

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N
	<u>AFRICA</u>				
FC0000	First Aid Centre	780	72	1974	Y
AF0000	African Rainforest Pavilion	46,440	4314	1974/00	Y
EH0100	Hippo Holding	6,145	571	1974	N
EH0200	Giraffe Holding	11,000	1022	1974/98	partial
AN0100	Penguin Holding	1,843	171	2011	partial
AN0200	Hyena Holding	1,000	93	1986	N
AN0300	Crested Porcupine Holding	330	31	1974	N
AN0400	Vacant Holding	695	65		N
AN0700	Wildebeast Holding	600	56	2012	N
AS1000	Rhino/Hoofstock Holding	8970	833	1998	N
AS1100	Bird/Hoofstock Holding	6400	595	1998	N
AS1200	Cheetah Holding	1645	153	1998	N
AS1300	Baboon Holding	1325	123	1998	N
AS1400	Lion Holding	1525	142	1998	N
AF4000	Africa Restaurant and Washrooms	7,748	720	1974/08	Y
AS1902	Market Bazaar West	200	19	1998	N
AS1903	Twiga Market	60	6	1998	N
AS1904	Kesho Park Headquarters	200	19	1998	Y
AS2000	Simba Safari Snack Bar/Washrooms	2665	248	1998	partial
AS2100	Savanna Shop	1120	104	2002	partial
AS2105	Africa Zoomobile Shelter	845	79		Y
AF4101	Africa Picnic Shelter	701	65		Y
AS1700	Serengeti Bush Camp Shelter	709	66		Y
AS1601	Savanna Picnic Shelter				
	<u>CANADIAN DOMAIN</u>				
CD0100	Waterfowl House & Viewing Shelter	980	91	1976	Y
CD0200	Raccoon Shelter	250	23	1974	N
CD0600	Grizzly Bear Holding	350	33	1976	N
CD0700	Moose Holding	1,300	121	1976	N
CD0900	Wolf Shelter	375	35	1974	N
CD1700	Weston Station/Washrooms	1,900	177	1976	Y
CD1800	Canadian Domain Zoomobile Shelter/Washrooms	1,235	115	1974	partial

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N
<u>AMERICAS</u>					
AM0000	Americas Pavilion	18,475	1716	1974/02	Y
MA0000	Mayan Temple Holding	4,000	372	1986	N
TT0100	Polar Bear Holding	3,738	347	1974/09	partial
TT0700	Polar Bear Viewing Shelter	516	48	2009	Y
TT0300	Reindeer Holding	600	56	2009	N
TT0500	Fox Holding	324	30	2009	N
TT0600	Wolf Holding	678	63	2009	N
TT0400	Snow Goose Holding	396	37	2012	N
AP0500	Caribou Café	5,920	550	1974	Y
AP0600	Beaver Tails	200	19	2002	N
AP0601	Tim Hortons	200	19	2002	Y
AP0602	Americas Zoomobile Station				
<u>OUTDOOR HOLDING</u>					
OH0100	Cheetah Holding #1	400	37	1974	N
OH0200	Cheetah Holding #2	200	19	1974	N
OH0900	Keeper Office	279	26		
OH1000	Horticulture Storage Shed	1258	117		
<u>OPERATIONS COMPLEX</u>					
HS0100	Hay Shed	1,950	181	1974	N
TR0000	Vehicle Maintenance Centre	10,800	1003	1974/94	N
AD0000	Administrative Support Centre	34,122	3170	1974	Y
QW0000	Quarantine	4,876	453	2007	N
IH0000	Invertebrate House (Small Finished Building)	1,840	171		N
CU0000	Conservation, Education & Research Centre	8,633	802		N
NS0000	Facilities & Services Centre	30,408	2825	1994	N
GR0000	Horticulture Centre	21,240	1973	1994	N
<u>AUSTRALASIA/EURASIA</u>					
AU0000	Australasia Pavilion	19,280	1791	1974	Y
EP0100	Wisent Holding	420	39	1975	N
EP0300	Dhole Holding	1,100	102	1985	N

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N
EP0400	Barbary Ape Holding	900	84	1974/89	N
EP0500	Przewalski's Horse Holding	1,065	99	1988	N
EP0600	Camel Holding	3,660	340	1987	N
EP1400	Red Panda Holding	375	35	1992	N
EP1500	Dromedary Camel Holding	575	53	1975	N
EP1600	Mouflon Holding	800	74	1987	N
EP1800	Yak Holding	1,150	107	1975	N
EP2000	Eurasia Keeper Facilities	1,400	130	1974	partial
EP2050	Former Eurasia Zoomobile Shelter	650	60	2002	Y
EP2060	Panda Gift Shop	925	86	2013	Y
EP2070	Mandarin Express	396	37	2013	N
EP2080	Washroom	197	18	2013	Y
EP2100	Reindeer Holding	1,000	93	1999	N
EP2400	Dr Schofield Filtration	196	18	2011	N
EP2500	Giant Panda Holding	2970	276	2013	N
EP2510	Giant Panda View Shelter	280	26	2013	Y
EP2600	Snow Leopard / Bird Holding	1847	172	2013	N
<u>NORTH & EAST BUILDINGS</u>					
BH0000	Block House	400	37	1936	N
BF0000	Black-footed Ferret Holding	600	56		N
MC0000	Marmot Holding	1800	167		N
GA0000	Gate House	900	84	1936	N
VH0000	Valley Halla	7400	687	1936	partial
MB0000	Main Barn	2000	186		N
PH0000	Pearse House	1600	149		Y
FI0000	Finch Barn	1200	111		N
PS0000	Potting Shed	353	33		N
DS0000	Drive Shed	1956	182		N

105 Buildings

TOTAL AREA (sq.ft.) 397,783

Comments

Family Washroom 2011

Expanded 2002

Comments

Gorilla Expansion 2000

Expansion 1998-To be renovated for
Giraffes in 2014.

Exhibit/Winter Viewing

Covered Seating 2008, to be expanded in
2015

Comments

Keeper Room Expansion 2002

New Holding 2009

Covered Seating 2009 & 2016

Renovated 2007

